



**2021 CLIENT TAX PREPARATION CHECKLIST**  
(WHAT YOU SHOULD BRING TO YOUR TAX APPOINTMENT IF APPLICABLE)

- Total amount received for the 3<sup>rd</sup> stimulus payment
- Total amount and date(s) you received the Advanced Child Tax Credit

• **INCOME**

- W-2s
- 1099s
- Pensions, Annuities, Profit Share, IRAs, etc.
- Social Security Benefits
- Interest/Dividend Income
- K-1s (when applicable)
- Investments Sold
- Virtual Currency (Bitcoin, LiteCoin, Etc.)
- Other Income

• **ESTIMATED TAX PAYMENTS** (amount & date paid)

- Federal Payments
- State Payments

• **ITEMIZED DEDUCTIONS**

- Medical/Dental/Vision Expenses
  - Co-Pays, After-Tax Insurance Premiums, Lab Fees
  - Prescription Drugs
- Taxes Paid
  - Real Estate
  - Sales Tax (New Vehicle Purchase)
  - Vehicle License Tax (Registration)
- Interest Expense
  - Mortgage, Current Residence, Second Home, (RV/Boat may be considered second home if qualified)
  - Mortgage Insurance Premium
- Charitable Contributions

- Cash – Contributions made by check, cash or credit card
- Non-Cash – Items donated to Goodwill, Savers or other nonprofit organizations (must be a 501c3 organization)
  - NOTE: Please value these items before you come in, use the link below for a valuation guide
  - GOODWILL: <https://www.goodwillaz.org/estimated-donation-values/>

**\*\*Please bring in ALL of your contribution receipts; they may qualify for a tax credit with the State of Arizona\*\***

- Miscellaneous
  - Gambling Losses (to the extent of gambling income)

- **DAY & CHILDCARE EXPENSES**

- Please provide:
  - Facility Name or Individuals Name
  - Facility's Address or Individual's Address
  - Facility's EIN# or SSN
  - The amount(s) you paid for the year
    - If there is more than one child, please break up totals.

- **SELF EMPLOYMENT/BUSINESS INFORMATION (SCHEDULE C)**

- Total Income
- Total Expenses, Identified/Listed
- Assets Purchased or Sold
- Cost of Goods Sold
  - Inventory
  - Purchase
  - Materials Supplies
- Total and Business Mileage
- Home Office Expenses (utilities, rent, etc.)

- **RENTALS**

- Address Of Each Rental
- Income Per Rental
- Expenses Per Rental

- **OTHER:**

- Final Settlement statements for ALL property purchased, sold, or re-financed

**\*\*REMINDER: PLEASE HAVE ALL RECEIPTS TOTALED, IF WE HAVE TO ADD THEM, WE CHARGE \$120/HR ON TOP OF YOUR TAX PREPARATION FEE\*\***