

ROSEMARY'S ACCOUNTING SOLUTIONS  
A Full Service Accounting Firm



Tax Preparation Checklist

Please review the following checklist and check any boxes that apply to you and bring all applicable documents to your appointment.

Personal Information:

- Driver's License
- Social Security Card
- IRS Letter 6475 Regarding your 2021 Economic Stimulus Payment

Dependent Information:


- Date of Birth & Social Security Numbers for all dependents
- Child Care Records (Including the provider's Tax ID #)
- Form 8332 showing child's custodial parent is releasing their right to claim a child to you the noncustodial parent (if applicable)
- IRS Letter 6419 (Regarding 2021 Child Tax Credit)

Income:

- W-2 Forms
- 1099-C Forms for Cancellation of Debt
- 1099-G Forms for Unemployment Income, or State Local Tax Refunds
- 1099-Misc. Forms for Independent Contractor Work
- 1099-R, Form 8606 for Payments/Distributions from IRA's, or Retirement Plans
- 1099-Int- Interest Income
- 1099-Div- Dividends
- 1099-S or 1099-B Income from sales of stock or other property
- Dates of acquisition and records of your cost or other basis in property you sold (If basis is not reported on 1099-B)
- K-1's For Corporation
- SSA-1099 Social Security Benefits

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- Alimony Received
  - Business Income Profit & Loss
  - Health Savings Account and long-term care reimbursements (1099-SA)

### Rental Income

- Records of Income & Expenses
- Rental Asset Information (cost, date placed in service, etc.) for depreciation

### Other Income & Losses

- Gambling Income (W-2G or records showing income, as well as expense records)
- Jury Duty Records
- Record of Alimony Paid (Need ex-spouse's name and SSN)

### Types of Deductions you may be Eligible For

#### Home Ownership

- 1098-INT Mortgage Interest
- Real Estate and Personal Property Taxes
- Receipts for Energy-Savings Home Improvements (Solar Panels, Solar Water Heater)

#### Charitable Donations

- Cash amounts donated to houses of worship, schools, other charitable organizations
- Records of non-cash charitable donations

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Medical Expenses

- Amounts paid for healthcare insurance and to doctors, dentists, hospitals

Health Insurance

- Form 1095-A if you enrolled in an insurance plan through the Marketplace Exchange

Childcare Expenses

- Fees paid to a licensed day care center or family day care for care of an infant or preschooler
- Wages paid to a baby-sitter (Do not include expenses paid through a flexible spending account at work)

Educational Expenses

- 1098-T From Educational Institutions
- Receipts for books and other school related expenses
- Records of any scholarships you received
- 1098-E Student Loan Interest You Paid

Other

- Foreign bank account information: location, name of bank, account number
- Did you obtain/sell any cryptocurrency for 2021