

List of Tax Preparation Forms, Documents for 2022:

Use the checklist below to gather your documents and other forms that you will need to file your taxes. Not all items may apply; keep track of your forms and store copies for your records when these items are returned to you.

General Information- *If You Are a New Client*:

- ___ Copy of Last Year's Tax Return.
- ___ Social Security Numbers for You and Your Spouse.
- ___ Dependents' Names, Birth Dates, and Social Security Numbers.
- ___ Routing Transmit Number (RTN) (For direct deposit/debit purposes)
- ___ Bank Account Number (BAN) (For direct deposit/debit purposes)

Taxable Income Forms, Documents:

- ___ W-2 Form(s) for Wages, Salaries, and Tips
- ___ Interest Income Statements: Form 1099-INT & 1099-OID
- ___ Dividend Income Statements: Form 1099-DIV
- ___ Sales of Stock, Land, etc. for Capital Gains: Form 1099-B
- ___ Sales of Real Estate: Form 1099-S
- ___ State Tax Refunds: Form 1099-G
- ___ Alimony received or paid
- ___ Unemployment Compensation received: Form 1099-G
- ___ Nonemployment Compensation: Form 1099-NEC
- ___ Miscellaneous Income: Form 1099-MISC
- ___ Retirement Income: Form 1099-R
- ___ Social Security Income and Railroad Retirement Income: Form SSA-1099
- ___ Business Income and Expenses
- ___ Rental Income and Expenses
- ___ Farm Income and Expenses
- ___ Form K-1 Income from Partnerships, Trusts, and S-Corporations
- ___ Tax Deductible Miles Traveled for Business Purposes
- ___ Letter 6475: Third Economic Impact Payment Amount
- ___ Letter 6419: Advanced Child Tax Credit Payment Amount

Tax Credits:

- ___ Child Tax Credit
- ___ Child Care Provider Address, I.D. Number and Amounts Paid for the child and dependent Care Credit
- ___ Earned Income Tax Credit (EITC)
- ___ Adoption Expense Information for the Adoption Tax Credit
- ___ Foreign Taxes paid

Itemized Deductions:

To qualify, itemized deductions must be higher than \$12,550 if single and married filing separately, \$25,100 if married, filing jointly and \$18,800 if Head of Household.

Medical Expenses for the Family: *To be deductible it must be over 7.5% of your 2021 Adjusted Gross Income*.

- ___ Prescription Medicines and Drugs
- ___ Doctor and Dentist Payments
- ___ Hospital and Nurse Payments
- ___ Tax Deductible Miles Traveled for Medical Purposes
- ___ Insurance Premiums paid out of pocket. (Including Marketplace Insurance)

Common Itemized Deductions:

- ___ Home Mortgage Interest from Form 1098
- ___ Real Estate Taxes Paid
- ___ State Taxes Paid with Last Year's Return (if claiming itemized deductions)
- ___ Personal Property Taxes Paid
- ___ Fair Market Value of Non-cash Contributions to Charities
- ___ Unreimbursed Expenses Related to Volunteer Work
- ___ Tax Deductible Mileage for Volunteer Purposes
- ___ Casualty and Theft Losses

Adjustments to Income:

- ___ Charitable Cash Contributions
- ___ Moving Expenses- (Military Only!)
- ___ IRA Contributions
- ___ HSA, FSA Contributions
- ___ Student Loan Interest Paid from Form 1098
- ___ Educational Expenses for you and your spouse if teachers

Tax Estimate Payments:

- ___ Estimated Tax Payments Made with ES Vouchers or Online
- ___ Last Year's Tax Return Over-Payment Applied to This Year

Self Employed:

- ___ Self Employed Business Expenses