



# TAX PREPARATION CHECKLIST 2021

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## Identification of all Individuals on Your Return

- License and/or State ID for you and spouse
- Social Security cards for all family members
- Previous tax year returns
- Childcare records with tax ID number or social security number of childcare provider

## Proof of Income

- W2 forms for all jobs
- 1099-MISC for contractual assignments
- 1099-SSA for social security benefits
- 1099-R for pension/annuity income
- 1099-DIV for dividend income
- 1099-INT for interest paid to you

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## Healthcare Requirements

- All marketplace consumers will receive a 1095-A form (can be downloaded from marketplace account)
- If your employer provides health insurance for you, a 1095-B form will be issued to you and the IRS

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## Education

- 1098T form from the college or university attended
- 1098E form for interest paid on student loans
- Educators, provide all receipts for unreimbursed supplies purchased

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## Self employment income

- Copy of LLC/ Corporation Documentation
- Business bank accounts' records
- Ledger recording income each month
- Receipts for expenses
- Record of any business miles
- List of clients
- Price sheet

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## Deductions and Credits

- Real estate and personal property taxes paid
- Receipts of cash and non-cash charitable contributions
- Form 1098 or other mortgage interest statements
- Receipts/Invoices from purchase energy efficient improvements made to principal residence
- Record of estimated payments made for current tax year

The Tax Cuts and Jobs Acts of 2018 is the largest tax overhaul since 1986. It eliminated many deductions that were typically used for itemized deductions. For more information about how your tax return may change this year, please feel free to contact us today.

## TAX TEAM SERVICES

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