2020 INDIVIDUAL INFORMATION CHECKLIST

This is a list of the most common items we'll need to complete your individual income tax returns. We will contact you if we need any additional information.

- ***WE MUST HAVE YOUR SIGNED ENGAGEMENT LETTER (Blue letter) WITH YOUR TAX DOCUMENTS TO PUT YOU IN LINE FOR PREPARATION***
- **Completed Client Questionnaire** included with your organizer
- Any changes in contact information, marital status, dependents, bank accounts, etc.
- Copy of current driver's license(s)
- If you received Federal Stimulus payment(s), please let us know the amount(s)
- If you received a health care subsidy, we need a copy of the 1095-A
- All W-2's
- All 1099 forms received confirming income from interest, dividends, retirement, social security, disability, unemployment, gambling winnings, non-employee compensation, etc.
- All legal documents for formation, sale or purchase of a business during the year
- If you and/or your spouse have a small business, please provide us with a back-up copy of your QuickBooks or other software you are using for bookkeeping, including the password.
- All income information for children if you want us to prepare any required returns
- Year-end statement of mortgage interest (Forms 1098), escrow activity and balance on mortgage or home equity loans
- Total of charitable contributions (***including receipts or letters***), and details for any non-cash contributions ***(list of items and values provided by you)***
- Copies of all LLC, Partnership or S-Corporation K-1's
- **If you bought, sold or refinanced real estate, we will need a closing statement for each transaction**
- Whether or not you are claiming auto mileage or actual expenses as a deduction for business or rental properties, we need to know:
    - total miles, commuting miles, and business miles driven for the year
    - interest paid on auto loan
    - If you lease your car or are not taking the auto mileage above, please ALSO provide:
        - Original value of the car (what you could have bought it for with cash) and copy of the lease, and all expenses for lease payments, gas, car washes, licenses, insurance, tires, repairs and any other out of pocket costs
- Copies of any federal, state or local tax correspondence during the year
- All legal documents for divorce decrees, bankruptcy or trusts
- Voided check for account where refunds should be directly deposited (optional)
- ***New clients***: Copies of prior federal and state returns and detailed depreciation schedules if applicable (at least one year, preferably two years)