

INFORMATION ABOUT YOUR INCOME

- ☐ Form W-2 for you and your spouse
- ☐ 1099-G form for unemployment income, or state or local tax refunds
- ☐ 1099-NEC form for you and your spouse for any independent contract work
- ☐ 1099-MISC form for you and your spouse for rent or other income
- ☐ 1099-R form for payments/distributions from IRA's or retirement plans
- ☐ 1099-Interest,-Dividend form for investment related income like interest and dividend
- ☐ 1099-B form for income from sale of stocks
- ☐ 1099-B or similar report for virtual currency transactions (*digital wallet or exchange report*)
- ☐ Schedule K-1 for income from investment in partnerships or S-corporations
- ☐ 1099-SSA form for social security benefits received during the tax year
- ☐ Business Income - Profit/Loss statement or records of income and expense for 2020
- ☐ Rental Income - Profit/Loss statement or records of income & expense and rental asset information
- ☐ Miscellaneous Income - Jury duty, Hobby income, state tax refund, Prizes & awards etc.

DEDUCTIONS AND ADJUSTMENTS TO YOUR INCOME

- ☐ Form 1098 for mortgage interest paid during the tax year (*applicable to home owners only*)
- ☐ Form 1098-E for student loan interest paid during the tax year
- ☐ Form 1098-T for tuition paid during the tax year
- ☐ Form 5498 showing IRA contributions made during the year
- ☐ Form 5498 SA for total contribution in HSA / MSA accounts
- ☐ Form 1099 SA for total distribution from HSA / MSA accounts
- ☐ Receipts for any qualifying energy-efficient home improvements (solar, windows etc.)
- ☐ Medical and dental expenses paid during the tax year
- ☐ Detailed list of charitable contributions made during the tax year
- ☐ Records of real estate taxes paid in the tax year
- ☐ Child Care expense (if any)

OTHER INFORMATION

- ☐ Notices, bills, etc. from the IRS or California
- ☐ Form 1095 for health insurance coverage during the tax year
- ☐ IRS Notice 1444-C and information regarding the amount of the third stimulus check.
- ☐ IRS Letter 6419 and information regarding the amount of Advanced Child Tax Credit payment received
- ☐ Estimated tax payment for federal and state made during the year
- ☐ Foreign bank account information. (*This may be required if you hold foreign bank accounts having a peak value of \$10,000 or more anytime during the tax year*)