

Tax Preparation

CHECKLIST

Personal Information and Documents

- Your social security number or tax ID number
- To get your refund by direct deposit or pay your balance owing, you'll need your routing and account numbers.
- If applicable, your spouse's full name, social security number or tax ID number, and date of birth.
- If you have IRS Notice 1444 or other records reflecting your EIP amount, you may have information regarding your stimulus payment, also known as an economic impact payment (EIP).
- To determine eligibility for the Recovery Rebate Credit, use IRS Letter 6475 – your 2021 Economic Impact Payment.
- If the IRS has provided you, your spouse, or a dependent an Identity Protection PIN, make sure to have it on hand for filing.

Dependent Information and Documents

- Dates of birth and social security numbers or tax ID numbers
- Income of dependents and of others in your home
- If appropriate, childcare records (including the provider's tax ID number)
- IRS Letter 6419 - documentation that contains all of the information you'll need to report your child tax credit (CTC)

Sources of Income

- W-2 Forms
- If you are unemployed, you will need to provide a 1099-G
 - If you are Self Employed, you will need the following:
 - Forms 1099, Schedules K-1, income records to verify amounts not reported on 1099-MISC or new 1099-NEC
 - Form 1040-ES
 - A Record of all expenses (i.e check registers or credit card statements, and receipts)
 - Depreciation information for business-use assets (cost, date placed in operation)
 - In-Home office records

