Quick Checklist

____ Copy of **Last Years Tax Return** (you don't need to make a copy, I will scan and return this with all of your tax documents

____ Signed/Dated **Engagement Agreement**

____ Completed **Client Intake Form**

____ Copy of **Driver's License** for each signer (you may take picture of and email it to me (donna@livingstontax.com) or you can text it to me at 810.206.9670.

____ 2021 Winter and 2021 Summer **Property Tax Bills**

____ If anyone on your prior year return has passed away, please indicate name and **date of death** on Intake Form

____ If any child that was previously a **dependent is now independent,** please make a note of this on the intake form along with the date they became independent.

____ If a dependent is 18 years or older, please note whether they are employed and if so, what they're annual income for 2021 was and if they are a full time student.

____ If any dependent is a **full time student,** please provide a form 1098T from their school so we can determine eligibility for education credit. Also note any out of pocket amounts paid for educational expenses (books, etc).

____ If you paid for **child care** for a minor child, please provide me with a statement from the child care provider for the amount paid for each child. The statement MUST have the provider's EIN number.

____ If you are an **educator,** please provide me with an amount paid out of pocket for educational supplies. Max per taxpayer is $250 each.

____ If you had a **student loan** last year, please provide me with a 1099 showing the amount of interest paid for the year. I cannot take a monthly statement

____ If you had an **HSA,** I will need a 1099SA showing any distributions for the year. Review your W2, if there is a code W on it, there is an HSA and I MUST have your 1099SA.

____ If you receive **UAW Legal Fund** benefits, please provide me with your 1099

____ If you rent, I must have the name and address of each **landlord** where you resided in 2021, and the amount of rent that you personally paid each month at each location.

____ If you rent and had **roommates,** I will need to know the amount of rent each roommate paid in each location as well as their approximate annual income to determine if you are eligible for a renter's credit.

____ If you had investments, I must have your **broker's statement** (1099B). I can not use your December statement. Most brokers statements are not issued until Mid February and many times they issued corrected statements later on in February and March.

____ If you **sold any property** during the year, especially your primary residence, I will need to know what the property was, the date purchased, the purchase price, the date sold, the sales price, any fees paid associated with the sale, and any expenses paid for improvements to the property. Provide me with a closing statement.

____ If you had **healthcare through the Marketplace** (Obama Care), I must have a 1095A.

____ If you received an **Advance Child Tax Payment,** I MUST have your 6419 Letter issued from the IRS. You may look online at www.IRS.gov and click on 'View Your Child Tax Credit Payments'.

____ I must know the amount your received for your **third stimulus payment** that was issued in early to mid January 2021. Review bank statements or check the IRS website at www.IRS.gov and click on 'Get Your Economic Impact Pymt Status'. Most amounts were $1,400 each.

____ If you **run a business** and file a Schedule C, you must provide me with all applicable income and expenses amounts. If you drive a vehicle for business purposes, provide me with the amount of miles driven for business purposes as well as all other miles driven for non business purposes. These figures are highly scrutinized, please keep a contemporaneous log for all business miles including the date, starting mileage, ending mileage, reason for travel, people met with and business conducted.

____ If you claim a **home office deduction,** this can only be used if you file a Schedule C and operate a business. Please note that you cannot claim a home office for simply working at home. If you operate a business at home, the space must be used strictly for business, it can have no other use according to IRS rules. I need square footage of office and total for home.

____ **"Work" clothes** deductions are allowed for "safety equipment/clothes". Only clothing that cannot be worn outside of work may be eligible for a clothing deduction.

____ If you had a **debt canceled** during the year, I MUST have a 1099C

____ If you had any **gambling income,** please provide your 1099G. Please note, if you cannot itemize, you cannot deduct gambling losses. Also, there are no deductions for gambling losses on your state income tax return. You must be able to substantiate your losses if your return is selected for examination.

____ If you received **unemployment benefits,** you MUST provide your 1099G.

____ If you made any **home improvements** that are eligible for an energy tax credit, please provide me with all information.

____ **Moving expenses** are only deductible if you are active military.

____ Amount **contributed for IRAs.** Please provide form 5498.

____ Any CASH **paid for charitable contributions,** provide amounts and payees.

____ If you paid or received alimony, I need to know the amount paid/received, the person it was paid to and their social security number, the date of your divorce.

____ If you can **itemize,** I will need:

Medical expenses including amounts paid for insurance, Rx, etc.
Mileage driven for medical reasons
Amounts paid for state and local taxes
Any sales tax paid on large items
State and local real estate taxes
Home Mortgage Interest (provide form 1098)
Home Mortgage Insurance Premiums (on form 1098)
Charitable Gift amounts cash
Charitable Gift amounts Other Than Cash (You must put value on it)
Any casualty or theft losses but only if in a federally declared disaster area

____ **Review documents** used to file your return in the prior year and ensure you have all those same documents prior to dropping off your paperwork.

W2s
1099R
1099G
1099INT
1099DIV
1099B
SSA-1099
1099MISC
1099NEC

____ Payment is due upon completion of your tax return. **I do not accept credit or debit cards or any other form of electronic payment.** Cash or check are the only form of payment I allow. This is done to eliminate the fees associated with these other types of payments so I can keep my prices low.