



# PERSONAL INCOME TAX ◆ 2021 CHECKLIST ◆

*This is only a checklist of items that may be used in preparing your personal income tax return. Please bring any official documents that apply to you. For all other income and expenses please bring totals only. If a line item applies to you and has "REQUIRED" listed – then additional info must be provided.*

## Personal information to verify

- Social Security numbers and dates of birth for any new dependents
- IP PIN letter issued annually from IRS (for compromised or stolen identity)
- Proof of dependent's residency.** Must have 2021 date, dependent name and your address for all dependents.  
Examples: 1095A, B or C, grade card or school record, medical records, MO Medicaid, or bank statement

## Information about your income

- W-2 forms for you (and your spouse)
- Stimulus #3 amount received – from IRS letter 1444 OR bank statement OR IRS website
- Advanced Child Tax Credit Pymts received – from IRS letter 6419 OR bank statements OR IRS website (ID.me)
- 1099-NEC (Non-Employee Compensation)
- SSA-1099 for Social Security benefits received
- 1099-R Retirement/Pension income
- 1099-INT, -DIV, -B, or K-1s for investment or interest income.
- K-1's from Partnership or S-Corporation income.
- 1099-G forms for unemployment income, or state or local tax refunds
- Alimony received and date of divorce OR date of modification
- 1099-S forms for income from sale of a property
- Miscellaneous: 1099 HSA, jury duty, gambling winnings, scholarships, etc.
- 1099-C or 1099-A for any debts cancelled or property abandoned
- Self- Employment, Rental or Farm Income (totals of income and expenses by category)
- 1099B - Sales of Investments, Block chains for virtual currency exchanges or virtual currency profit reports
- 1099K's – Income received from credit cards, Venmo, Square, or other cash apps

## Deductions and credits

*The following items may help reduce the amount of your income that is taxed, which can increase your tax refund, or lower the amount you owe:*

- Form 1095-A for Affordable Care Act -REQUIRED if you had healthcare.gov or marketplace health insurance
- Form 1095-B, 1095-C (not required but helpful for dependency verification)
- Form 1098-E for student loan interest paid (or loan statements for student loans)
- Form 1098-T for tuition paid - this form is REQUIRED
- For teachers: totals for expenses paid for classroom supplies, PPE, etc.
- Records of IRA contributions made during the year
- Records of Medica/Health Savings Account (MSA/HSA) contributions not reported on W-2
- Out of Pocket Health insurance premium totals
- Alimony paid and date of divorce OR date of modification
- Child care costs: provider's name, address, tax ID, and amount paid
- Adoption costs: SSN of child; totals and records of legal, medical and transportation costs
- Forms 1098: Mortgage interest, private mortgage insurance (PMI) on main or 2<sup>nd</sup> homes, if itemizing
- Charitable donations: qualified charity receipts, value of donated property with receipt; mileage, (Even if you do not itemize, you can deduct \$300 if single and \$600 if married – if receipts are provided)
- Medical & dental expense totals; amount paid out of pocket for health insurance, mileage, (IF ITEMIZING)

## Taxes you've paid

- Federal and state estimated tax payments and dates paid
- Real estate tax paid receipt, if itemizing
- Personal property tax paid receipt, if itemizing

*Brought to you courtesy of:*

**Norma's Tax Service**

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