

ACCOUNTAX

of OREGON INC.

We Do Taxes

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Document Gathering Checklist - Check & Provide All Documents That Apply

New Clients Provide Copy Of:

- Social Security card(s) copy
- Driver's License(s)/State Issued ID(s)
- Last filed Federal/State tax return

All Clients:

- Wage statements, W-2's
- IRS Letter 6419 Advance Child Tax Credit
- Credit payments you received in 2021
- Tax Year 2021 3rd Economic Impact Payment TTL \$ (Stimulus) IRS Letter 1444C
- New Dependents' SSN #/D.O.B.
- K-1's
- Alimony paid or received
- Self-employment business income and expenses - (P&L Generic Form upon request)
- 1099-NEC*/1099-MISC*/1099-K
- Commissions received/paid
- Pension, retirement income/1099-R
- Unemployment income/1099-G
- Canceled Debt Amount/1099-C
- Social Security income/SSA-1099
- State refund amount/1099-G
- Statements on the sales of stocks or bonds/1099-B
- Interest & dividend income/1099-INT/1099-DIV
- IRA contributions
- Lottery or gambling winnings/losses
- Any Extension, Estimated, Foreign taxes paid w/dates
- Call us if you need an Extension - (See our Engagement Letter Chart for deadlines)

- Mortgage or home equity loan interest paid/1098
- Income and expenses from rentals
- Record of purchase or sale of residence
- Real estate and personal property taxes
- Receipt(s) for qualified energy efficient home improvements
- Casualty and theft losses related to a qualified disaster
- Moving expenses for member of military
- State, Local, Sales taxes paid
- Insurance for Home Office only
- Cash and non-cash charitable donations
- Job-related educational expenses
- Educator expenses
- Tuition and Education Fees/1098-T
- Student loan interest/1098-E
- Child care expenses, with name, address, SSN or EIN of the Provider
- Form 1095-A (Health Insurance Marketplace Statement) if purchased through Federal or State Marketplace
- Medical/dental expenses (OR residents 65+ for each spouse)
- Form 1095-B/1095-C Health Coverage Statements from Insurer/Employer
- Any IRS or Agency Letters received + PIN

- Fully Completed Simplified Tax Organizer current contact information, status, banking for auto debit or refunds, (changed or not)
- Initialed & Signed Engagement Letter