PROFESSIONAL BUSINESS SERVICES

Tax Return Information Sheet

Name:							
Address:							
Town:		State:		Zip			
home phone:			Cell phone				
Email:							

Please don't assume we have the above information - please included it in your packet

Tax Information Checklist

Not everything applies to everyone - simply check-off/send what applies to you

Yes	No	Information to include	Yes	No	Forms to enclose (returning customers)
Status Changes					W-2
		Filing Status (Single, Married etc etc)			1099 (Non-taxed income)
		Address			Unemployment form 1099G
		Spouse/Dependent names (first & last)			Social Security statement (SSA1099)
		Taxpayer/Spouse/Dependent DOB			Interest Statements
		Over 65?			List of Contributions
		Occupation			List of Medical expenses
		Social Security # for taxpayer & dependents			Health Insurance form 1099HC or 1095
		Last year's return if new customer			Stimulus check amounts received if any
Taxes					Child Tax Credit checks received
		Estimated taxes paid			New child social security numbers
		Bank Information for direct deposit			Mortgage interest paid/Rent paid
		IRS provided PIN			Rental income
Income Information					Dividends
		W-2			Real Estate Taxes
		Interest earned			Excise Taxes
		Dividends			**Note regarding Contributions and Medical expenses:** We do not need to see each receipt. We simply need a list of each contribution and/or a list of each medical expense. You keep each receipt for 7 years as proof, however, we do not need them included in the package you drop off.
		Alimony (include agreement date)			
		Pension/Annuity			
		Unemployment			
		Social Security			
		Non-Taxable income			
		IRA withdrawal			
		IRA rollover			
Other information			**Other continued**		
		Sale/purchase of new home			Adoption Expenses
		Lump sum distributions			HSA Contribution
		Retirement Contributions			Homebuyer Credit Repayment
		Excess Gifts			Debt Forgiveness
		Lottery/Casino winnings			Commuter Transport Benefits
		Student Loan Interest			Pandemic loans/grants received
		Teacher Expenses			Work at home expenses (may or may not apply)
		Energy Credits			

Please use space below for notes regarding any or all of the above