MANIETTA
BUSINESS ADVISORS, CPAS

# TAX APPOINTMENT CHECKLIST

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|---|---|
| W-2' s | |
| Interest Income (1099-INT forms) | |
| Investment income – dividends (1099-DIV) | |
| Investment Income – Capital gains/losses | |
| IRA's / Pension distributions (1099-R) | |
| Schedule K-1's | |
| Unemployment benefits (1099-G) | |
| Social Security (SSA1099) | |
| HSA statements (1099-SA) | |
| Self-employed health insurance | |
| Medical expenses for the year paid out of pocket | |
| Mortgage Interest (1098) | |
| Real Estate Taxes – all properties | |
| Charitable contributions – receipts and statements | |
| Dependent care information | |
| 529 Plan Contributions | |
| IRA Contributions | |
| Rental Properties – Revenues and Expenses | |
| **Payment for our services – cash, check or credit card** | |

Did your marital status change ? Yes________ No_________

Did you move ? Yes _______ No_________

Did you have a baby ? Yes _______ No ________

Do you have a child in college ? Yes_________No _________

Did you receive the $1400 Stimulus Yes ________ No___________

If yes, what is the total amount received $_____________________

Did you receive Form/Letter 6419? Please bring the form with you. If not, we will need the total advanced payments received in 2021. **We will not file without this information**.

**Other 1099 FORMS you may receive:**

1099-MISC – Rents, Royalties, Non-Employee Compensation

1099-K – Merchant Card & Third Party Network Payments