



2022 TAX YEAR RETURN PREP CHECKLIST

New Client Information

- Driver's License
- Social Security Number
- Current address
- Phone numbers (cell/home/work)
- Email address
- Occupation
- Previous Year Tax Return
- Checking/Saving Name, Account and Routing Number for Direct Deposit

Dependent Info (if any)

- Dependent Birth Certificate
- Dependent Social Security Card
- Dependent Days Lived with Taxpayer
- Dependent Qualified Child Care Info: Daycare name, EIN, address, phone number and expenses paid for each dependent
- Dependent College 1098T Form
- Dependent College Expenses

Income

- Wage and Tax Statement (Form W-2)
- Government Payments (Form 1099-G)
- Capital Gains/Losses (Form 1099-B)
- Capital Gains/Losses (Sch D)
- Capital Gain Distribution and Ordinary Dividends (Form 1099-Div)
- Bank Interest (Form 1099-Int)
- Misc Income (1099-Misc)
- Distribution from Pensions, IRAs (Form 1099-R)
- Social Security (SSA-1099)

Income - Self-Employed

- Business Profit or Loss (Sch C)
- Rental Property Income (and expenses)
- Nonemployee Compensation (Form 1099-NEC)
- Business Expenses
- Car Expenses (actual expenses or mileage)
- Home office expenses
- Business use asset info (cost, date placed in service, etc.)
- Payment Card & 3rd Party Transactions (Form 1099-K)

Deductions

- Educator Expenses
- Home Interest/Real Estate Taxes (Form 1098)
- Student Statement (Form 1098-T)
- Charitable Donations
- Medical/Health Expenses

Credits

- Advanced Child Tax Credit
- Child and Dependent Care Expenses (Form 2441)
- Health Insurance Marketplace Statement (Form 1095-A)

This is a general list of commonly used income, deductions, and credits. Please let me know if you have any other forms of income, deductions or credits as I am here to help.

CONTACT ME:

PHONE: 949-229-5479

EMAIL: PHOEBE@LEGACYTAXPREPSERVICES.COM

WEBSITE: WWW.LEGACYTAXPREPSERVICES.COM