

Taxpayer Name: _____

Last 4 SSN: _____

Done	Req'd	THIS SHEET IS SCANNED FIRST
	X	Government Issued IDs for Taxpayer and Spouse (if any)
	X	Social Security Cards – for Taxpayer, Spouse, and all Dependents
	X	Completed and signed 14446 Form
	X	Intake Form – all pages with corrections from interview if any
		2019 Federal and State Tax Return Did we complete your 2019 Return?
		Bank Account – blank / voided check
		Notice 1444 – Economic Impact Payment Notice
Income:		
		Form W-2 - Wages / Salary from employment
		Form 1099-G - State Refund or Unemployment
		1099-INT - Interest
		1099-DIV - Dividends
		1099-R - Received by way of a distribution from retirement, IRA, annuity, pension, profit-sharing, insurance contract, or survivor income benefit plan
		RRB-1099-R - Retirement/pension income from railroad retirement
		SSA-1099-R - Pink and white statement from social Security Administration showing benefits received.
		1099-MISC - Reflects income received from royalties, rents, prizes, awards, medical and health care benefit
		1099/NEC - Reflects income received for work performed as an independent contractor or for self-employment.
		Expenses & Mileage related to self-employment: <i>Please use the attached Schedule C Worksheet to summarize these expenses</i>
		1099-K - You may receive this form if you performed for-hire driving services or if you received income through a third-party payment network such as Uber, Lyft, DoorDash, GrubHub, etc.)
		Brokerage statement – includes capital gain/loss information and possibly interest and dividends. <i>Scan all pages</i>
		Form 1099-S – Possibly received if you sold a home, residence, or real estate.
		Schedule K-1
		Form W2-G - Gambling winnings – Includes bingo, lottery, casino, etc
		Form 1099-C – Cancellation of Debt

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Adjustments, Deductions, Credits		
		Complete Itemized Deduction & Credits sheet <ul style="list-style-type: none">- Fill out, or correct as needed- Include 2019 OR Return payment of tax due – possible Fed deduction- Include Federal & State Estimated Payment (including refunds carry forwarded from 2019)- Include Political Contributions
		Child & Dependent Care – Please provide the name, address, and EIN of the care provider, as well as the amount you paid and for which child or dependent the care was provided. Include any statement received from the care provider
		Form 1099-Q – Received if you took a distribution from a Qualified Education Program
		Form 1098-T – Received if you or dependents attended an educational institution – <i>Complete the Education Worksheet</i> as well.
		Form 1095-A – Received if you or dependents had medical insurance through the Marketplace.