

Checklist for Individual 2021 Taxes

In order to prepare your individual income tax return, I need the financial information listed below. New clients must provide copies of valid IDs.

You can upload your tax documents via my secure server located at :

<https://gbetancourtcpa.securefilepro.com/>, please use the "Guest File Transfer".

- Form(s) W-2 (wages, etc.) Form(s) 1099 (interest, dividends, etc.)
- Form(s) 1095-A: Insurance Marketplace Statement**
- Form(s) 1098-T: Tuition Statement 1099-Q: Payments from Education Plans
- Schedule(s) K-1 (income/loss from all partnerships, S corporations, etc.)
- Form(s) 1098 (mortgage interest,) and property tax statements.
- Brokerage statements from stock, bond or other investment transactions, including purchase date and price of all securities sold.
- Closing statements pertaining to real estate or business transactions.
- Financial statements for any rental properties, farm operations, or sole proprietor businesses.
- Contributions to retirement plans including 401(k), traditional IRA, Roth IRA, HSAs & College Savings Plans.
- Any new dependents for the tax years along with birthdates and social security numbers.
- Any Federal estimated tax payments made for the tax years including dates & amounts.
- Amounts in Foreign Banks and Financial Accounts (FBAR reporting to US Treasury) & Disclosure of owned or controlled offshore business entities.
- All virtual currency transactions