TAX APPOINTMENT CHECKLIST

If you have a tax appointment, because of Covid-19, the preferred method of conducting your interview is via telephone interview. If this is suitable to you, there are 3 options to drop off. Tax documents can be sent via mail, dropped off by using our secure letter slot in our storm door, or call to schedule a drop-off time with the front desk (mask required). If you prefer a face-to-face interview, no problem but masks will be required.

TELEPHONE or VIRTUAL INTERVIEW – We will start your return at the prescheduled time for your appointment. Please give the tax professional sufficient time to review and input your tax data. This might take 1/2 hour to 1 hour depending on the detail of your information. When the review is complete Denise will call you.

Just as a reminder, we cannot start your 2020 tax return without the following, if applicable**:**

- ☐ **Signature(s) on the engagement letter along with all of your 2020 tax information: There should be a Tax Engagement Letter included with your packet.** If not, you can **print a tax engagement letter from our web site** (located under Worksheets & Forms). Both spouses/partners must read, sign and date the engagement letter.
- ☐ Driver's license: If a joint return we will need both party's driver's license.
- ☐ **New: Copy of letter you received related to 2020 stimulus rebates.**
- ☐ **New: Charitable Donations – Above the line deduction**
- ☐ New clients: If you are a new client, we will need a copy of any dependent's social security card and birth certificate.
- ☐ New dependents for existing clients: We will need a copy of your new dependent's social security card and birth certificate.
- ☐ All dependents under the age of 17: We will need documentation such as school records, medical bills or any other document which shows your child's name, the address where the child lives and the parent(s) name claiming the child.
- ☐ If you want your refund directly deposited or balance due automatically withdrawn we will need the **Bank Verification Form** signed by all parties noted on the return. If one was not included with your packet, you will find the **Bank Verification Form** on our website under Worksheets & Forms.
- ☐ **Please remember to include your last YTD payroll stub(s) from each employer you had in 2020. Please be sure last payroll stub is dated 2020.**
- ☐ 401K year-end statements and other retirement statements.
- ☐ **If you have a rental property, business or hobby and paid anyone for services of $600.00 or more throughout 2020, you will need to submit Form 1099-NEC or Form 1099-MISC.** If you would like us to complete your 1099 forms please have the proper information in **our office by January 8, 2021. Failure to file 1099's by January 31, 2021 may incur a substantial penalty from the IRS for each 1099 that is not filed.** Please visit our web site and review the 1099 instruction sheet and worksheet.
- ☐ **Business owners, landlords and certain employees:** Please do not forget to log your odometer 12/31/20. Also, if applicable, do not forget to value your inventory on 12/31/20 using the actual cost you paid.
- ☐ If you purchased health insurance through the Marketplace you will receive a Form 1095A. You might need to go online to www.healthcare.gov to retrieve this form. The IRS is telling us the Marketplace is required to send Form 1095A by January 31, 2021. **We will not be able to complete your 2020 federal income tax return without your Form 1095A.**
- ☐ If you do not have a face-to-face appointment please complete the questionnaire found on our website under Worksheet & Forms.