

FOULK HUBER PA

2021 TAX RETURN CHECKLIST

INCOME

- _____ Form W-2 – Wages
- _____ Form 1099 - Interest and Dividends
- _____ Form SSA-1099 - Social Security benefits
- _____ Form 1099R - Pensions, IRAs and Annuities
- _____ Form 1099B - Sale of stocks and bonds
- _____ Form 1099-NEC – Self-employment income
- _____ Form W-2G – Gambling Winnings
- _____ Form 1099-G – Unemployment Benefits (**NJ will email to you if your email is on file**)
- _____ Schedule K-1- Partnerships, LLCs, S Corporations and Trusts
- _____ Rental properties - Rent received and expenses paid by property. For vacation homes, provide number of days rented and used personally.
- _____ Schedule C - Business income – Total income earned and detail of expenses paid. **Business mileage for 2021 was \$.56 per mile.**
- _____ Alimony received.

ADJUSTMENTS TO INCOME

- _____ Contributions to IRA, traditional or Roth
- _____ Form 1098-E - Student loan interest paid (access on-line)
- _____ Alimony paid.
- _____ Teacher classroom expenses
- _____ Form 1099SA & 5498SA - Health Savings Account info

ITEMIZED DEDUCTIONS/CREDITS

- _____ Medical expenses (summary of expenses only) **Medical mileage for 2021 was \$.16 per mile.**
- _____ Real estate Taxes
- _____ Quarterly estimated state and local income taxes payments, including dates paid
- _____ Mortgage Interest paid; Form 1098
- _____ Charitable Contributions (summary only of both cash and non-cash donations) **Mileage for charitable work in 2021 remained unchanged at \$.14 per mile.**
- _____ Child care expenses, including the name, address and tax ID# for the provider.
- _____ Education Credits - tuition, and other expenses paid for you and your dependents. Include Form 1098-T Tuition Statement from the college or university.
- _____ **Third EIP (Stimulus Check) –The IRS mailed Letter 6475 with the exact amount received or verify the amount by checking your bank account.**
- _____ **Advanced Child Tax Credit Payments – The IRS mailed Letter 6419 with the exact amount you received in 2021 or verify the amount received by checking your bank account.**