

What to bring to your preparer...

Please keep in mind, **not everything on this list will be needed** by every individual.

It is meant to **serve as a helpful reminder** of general guidelines.

General

- Driver's License ***required for BOTH spouses**
- Social Security Card(s) for NEW dependents only
- Last year's Federal AND State tax return (if not done at Griffin Accounting)
- How much** Economic Impact Payment/ **STIMULUS did you receive**
- DIRECT DEPOSIT INFO
- Alimony paid OR received NEED SS# of payee (Divorce decrees prior to 12/31/2018)
- IRA Contribution
- 1095-A**; Insurance/Marketplace statement (You may have multiple types)
- December/January Heating bill (for home heating credit*)
*for LOW income families

Income


- W-2 wage statements
- W-2G Lottery or Gambling winnings
- 1099-R Pension or retirement income
- 1099-INT/1099-DIV Interest and Dividend Income
- Commissions paid OR received
- Record of Purchase & Sale of Residence & dates
- 1099-G state refund amount
- SSA-1099 Social Security income
- 1099-G Unemployment income
- 1099-B Information on sales of Stocks or Bonds
- 1099-C Cancellation of Debt

Expenses

- Estimated taxes paid
- Foreign taxes paid
- 1098-E Student Loan Interest
- 1098-T Tuition expenses
- Proof of Education Expenses (books, lab fees)
- Child Care expenses and provider information
- Property Tax Statements

If itemizing (for Schedule A)

Updated Standard Deductions (Single - \$12,400 / HoH - \$18,650 / MFJ - \$24,800)

- State and local sales taxes paid
- Lottery or Gambling losses
- Cash and noncash Charitable donations
- 1098 Mortgage/Home Equity loan Interest paid
- Real Estate and Personal Property taxes paid
- Casualty and Theft losses (FED DISASTER AREAS only)
- Medical, , & Dental expenses over 7.5% of income

For Businesses

- 1099-MISC/1099-K Self-employed business/Farm income & expenses
- Schedule K-1 Income from Partnerships, S-Corporations, Trusts, and Estates
- Business expenses (repairs, maintenance supplies, taxes/licenses)
- Home office expenses (utilities, repairs, internet, phone, etc., also need sq. ft. of Business Area)
- Did you receive a **PPP LOAN, EIDL Grant, Employee Retention Credits** or any other grants?
- Income and Expenses from Rentals
- Business auto mileage
- Business income
- Equipment purchased
- Job-related educational expenses
- Educator expenses
- RENTAL EXPENSES: taxes, mortgages, insurance and repairs
- FARM Income / EXPENSES

Griffin Accounting®

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