

# Golden Apple Agency Inc

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## Tax Preparation Checklist

Note: Not all will apply to you

### Personal Information

- Name, Date of Birth, Social Security Cards, Driver licenses for all members of the household.
  - New Customers we will require proof of identity.
  - Current customers, we will be periodically updating our records, so we might periodically ask for an updated driver license.
- Address, phone number, and emails
  - If you have recently moved or changed your address please let us know.
  - E-mails are very important as we move into online secure document sharing.
  - Current customers, if we don't have your email please provide one as soon as you can.
- Copy of your last year's tax return if it wasn't completed by us

### Sources of Income

- Employment Wages – W2 forms
- Unemployment or state tax refunds (1099G)
- **Savings & Investments or Dividends**
  - Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
  - Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
  - Expenses related to your investments
  - Record of estimated tax payments made (Form 1040ES)
  - Income from sales of stock or other property (1099-B, 1099-S)
- **Retirement Income**
  - Pension/IRA/annuity income (1099-R)
  - Traditional IRA basis (i.e. amounts you contributed to the IRA that were already taxed)
  - Social security/RRB income (1099-SSA, RRB-1099)
- **Sale of home or rental property**
  - Please provide a closing statement
  - Depreciation if claimed (rental properties)
- **Other Income & Losses**
  - Schedules K-1
  - Gambling income (W-2G or records showing income, as well as expense records)
  - Jury duty records
  - Hobby income and expenses
  - Prizes and awards
  - Trusts
  - Royalty Income 1099 Misc.
  - Any other 1099s received
  - Investments (stock sales)
  - Health Savings Account
  - Record of alimony paid/received with Ex-spouse's name and SSN (if established before 2018)

## Deductions

- **Home Ownership**
  - Forms 1098 or other mortgage interest statements
  - Receipts for energy-saving home improvements
- **State & Local Taxes or Sales Tax**
  - Real estate and personal property tax records
  - Amount of state/local income (other than wage withholding) or sales tax paid
  - Proof of vehicle sales tax paid
- **Charitable Donations**
  - Records of cash donated to charitable organizations
  - Records of non-cash charitable donations
  - Miles driven for charitable
- **Medical Expenses**
  - Amounts paid for healthcare insurance and to doctors, dentists, hospitals
  - Miles driven for medical purpose
  - Health Insurance Information
- **Dependent Care Expenses**
  - Childcare records (provide tax ID number)
  - Elderly parent care (are you taking care of an elderly parent?)
- **Educational Expenses**
  - Forms 1098-T from educational institutions
  - Form 1098-E if you paid student loan interest
  - Books from the educational institution purchased
  - Room and Board
  - Other itemized educational expenses
- **Retirement & Other Savings**
  - Form 5498-SA HSA contributions
  - Form 5498 IRA contributions
  - All other 5498 series forms (5498-QA, 5498-ESA)
- **Federally Declared Disaster**
  - Records to support property
- **Estimated Tax Payments**
  - Records of estimated tax payments (form 1040ES)
- **Health Insurance through [healthcare.gov](https://healthcare.gov)**
  - 1095-A form

## Rental Property Income/Loss

- Records of income and expenses
  - Profit/Loss Statement
  - Form available on our website
  - Each rental property needs their own form
- Depreciation Information
  - Rental asset information (cost, date placed in service, etc.)

## Self-Employed

- Records of income and expenses
  - Profit/Loss Statement
  - Form available on our website
- Forms 1099-NEC
- Business-use asset information (cost, date placed in service, etc.) for depreciation
- Office in home information, if applicable
- PPP or EIDL loan information