**2021 TAX APPOINTMENT CHECKLIST**

PERSONAL INFORMATION:

* Last years tax return if you are a new client
* Name, address, social security number and date of birth for yourself, spouse and dependents
* Banking information for direct deposit of refund or direct pay of taxes owed – routing, account numbers, whether checking or saving, bank name
* Amount of any stimulus payment received in 2021
* Amount of advance child tax credit received 2021
* Dependent proof of residency – school records, medical statement, anything proving residency for more than 6 months
* Head of Household only – portion of expenses paid vs total expenses, see client update form

INCOME DATA REQUIRED:

* W-2 for wages, 1099 for unemployment
* Interest / dividend income
* State/local refund received if itemized prior year
* Social Assistance income
* Pension, 401, IRA, Annuity Income – 1099 Forms
* Stock or bond sale statements
* Contract/Partnership/Trust/Estate/S-Corp Income Statements – K1
* Gambling/Lottery W-2’s, records of income/losses also prizes & bonus
* Alimony Income
* Rental Income
* Self-Employment income & expense records
* Foreign Income
* Health Savings Account Statement

EXPENSE DATA REQUIRED

* Dependent Care statement from provider
* Education/Tuition Costs – form 1098-T – also costs for books & supplies
* Gambling costs
* Estimated Tax amounts paid to Federal, State and Local governments with date and amount paid
* Charitable Giving Statements
* IRA Contribution Records
* Expense amounts paid with Health Savings Accounts

If Itemizing

* Out of Pocket Medical Expenses not covered by insurance or paid for with before tax funds
* Mortgage Loan Interest Statement, Real Estate Taxes

New for 2021, Kansas allows taxpayers to itemize even if they use the standard deduction for federal so be sure to bring mortgage, property tax charitable and out of pocket medical (if applicable)