



# Business & Tax Consultants, Inc.

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## TAX MATERIALS CHECKLIST

Items in green link to a form

### Our Forms:

- A signed [Engagement Letter](#).
- A completed [Questionnaire](#) including, if applicable,
- A [Dependents](#) form, and/or
- A [Credits & Deductions](#) form and/or
- A [Foreign Interests](#) form
- Bank information for direct deposit (a void check if possible—not a deposit slip.)
- New client?
  - Last year's tax return
  - Copies of Social Security cards for taxpayer, spouse and all dependents
  - A completed [New Client Intake](#) form

### “Important Tax Information” documents:

- Vermont Property Tax bill—the most recent bill, not a list of what you paid.
- W-2s
- IRS Notice #1444 and #1444B setting out your stimulus amounts. See next page for more information. \*
- 1099Misc and 1099NEC (new form given by businesses to subcontractors)
- 1099 Int—Bank form showing interest paid to you
- 1099 Div & B or “Consolidated Tax Statement”—from your investment account if you have one
- 1099-SA—Year-end statement from Social Security**
  - (this is a tear-off-the-tab form with pink boxes. If you can't find it, call Karen or Donna and ask how to replace it.)
- 1099R if you received pension income or withdrew from your IRA.
- K-1s from Partnerships or Corporations
- K-1s from Trusts or Estates
- 1098T for any student AND a **statement of account** showing tuition billed and paid with dates.
- 1098Q showing distribution from an Education Savings Plan.
- 1098 showing mortgage interest paid.
- Other 1099s for income such as unemployment compensation or gambling winnings
- 1095-A if you get health insurance on the marketplace (Obamacare/ACA)
- 1099C or A if debt has been canceled such as a credit card debt negotiated for a lower amount.
- Statements from Child or other dependent care providers. (Children 12 or under)
  - Or a list of day care providers and day camps used so you can work or go to school including
    - Name & Address
    - Tax ID number (unless we got it in a prior year) and total paid per child

\* Enrolled agents (EAs) are America's Tax Experts. EAs are the only federally licensed tax practitioners who specialize in taxation and also have unlimited rights to represent taxpayers before the IRS.

- If you are a retired teacher, state or municipal employee and your medical insurance is paid through your pension, a copy of your yearend statement.
- Copy of Social Security card for any dependents you have not claimed before.

**Income not reported on forms that you need to tell us about:**

- Alimony received— (Please give us a copy of your divorce order if we do not already have it)
- Child support received (if applying for VT property tax assistance or renter’s rebate)
- Tips not reported to your employer
- Hobby or odd job income
- Self-employment income not reported on 1099s
  - Use our forms to help:
    - [Schedule C Worksheet](#) (if you have your own method of giving us your numbers such as QuickBooks reports we still need the 1<sup>st</sup> page completed)
    - [Office in the Home](#)
- Rental income—choose the best form for your situation:
  - [an apartment \(or room\) in your home](#) or [a separate building](#) without expenses shared with your home.
- [Foreign source income or foreign accounts.](#)
- [Farm Income](#)

**\*Stimulus Payment Information:**

As of mid-January, two federal stimulus payments have been authorized. The first one was issued in 2020 and the second in 2021. You should have received letters (IRS #1444 and #1444B) telling you the amount. Please give us those letters. If you cannot find them, please get the information at <https://www.irs.gov/coronavirus/get-my-payment> If you cannot print the information, please write it down and tell us that you took the information from the website. If you have no internet access, we will contact you for more information.