

# Business & Tax Consultants, Inc.

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## 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 info for direct deposit (a void check—not a deposit slip—if you are changing accounts.)
- 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—if a resident.
- W-2s
- IRS Letter 6475 setting out your 3<sup>rd</sup> stimulus payment. See next page for more information. \*
- IRS Letter 6419 setting out your Advanced Child Tax Payments (if you have dependents.)
- 1099Misc and 1099NEC
- 1099 Int from 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 Donna or Karen and ask how to get a replacement.)
- 1099R if you received pension income or withdrew from your IRA or other retirement account.
- 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. AFSP signifies that the preparer has completed the Annual Filing Season Program run by 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 year-end 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:**

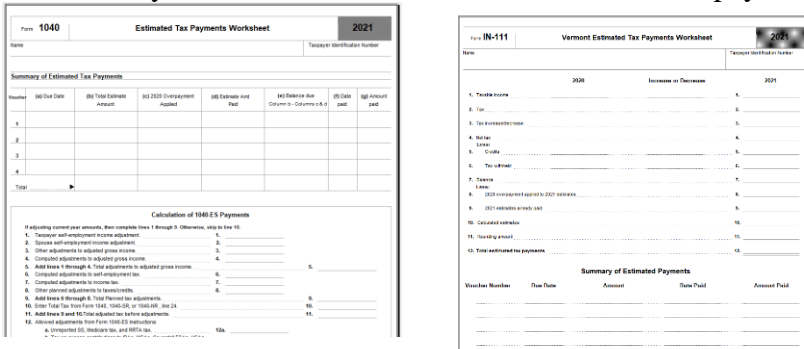
- o Alimony received— (Please give us a copy of your divorce order if we do not already have it)
- o Child support received (if applying for VT property tax assistance or renter’s credit)
- o Tips not reported to your employer
- o Hobby or odd job income
- o Self-employment income not reported on 1099s
  - o 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](#)
- o 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.
- o [Foreign source income or foreign accounts.](#)
- o [Farm Income](#)

**\*Stimulus Payment Information:**

**In January of 2022**, you should have received a Letter 6475 telling you the amount of your final stimulus payment. The 3<sup>rd</sup> stimulus was issued by the federal government starting in April of 2021. (You do not have to pay tax on this income.) If you did not get the letter, there are instructions about what to do with the Questionnaire.

**Estimated Payments:**

If we suggested you make estimated payments, please give us the worksheets we gave you with your returns last year filled in with the dates and amounts of payments made. They look like this:



If payments were recommended but you did not make any, please give us a note saying that. Even better, if you paid online (did not mail ANY checks) you can get a printout to give us or you can request an IRS transcript and give it to us. This is not an easy task so hopefully you kept track. **THIS IS THE MOST COMMON REASON TAXPAYERS GET IRS LETTERS**—Because the estimated payments we enter on the tax return (based on the information you give us) does not match what they received. They are occasionally wrong but most often it is the information we report that is wrong. If you would like us to pull a transcript, give Donna or Karen a call and we can send you a form to sign.

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