



# 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 info for direct deposit or debit (include a void check—not a deposit slip—if you are changing the account you used previously.)
- If you are a new client
  - Last 2 year's tax returns
  - 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
- 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 S Corporations
- K-1s from Trusts or Estates (if you inherited money, ask the executor if you will be getting one)
- 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.
- 1099Ks reporting **income** from PayPal, eBay, credit cards and other payment processors. This income may not be taxable but it must be addressed to avoid letters.

- 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
- 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:**

- 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)
- 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 and/or foreign accounts.](#)
- [Farm Income](#)

### **Estimated Payments:**

- The worksheet we gave you listing the payments filled in with dates and amounts, or
- A list of estimated payments made to the IRS and any state WITH DATES, or
- A note that you **did not make any payments if they were recommended.**
- If payments were made online, you should be able to print out a list of payments

**Please remember that your last payment might have been made in January of 2023.**

**THIS IS THE MOST COMMON REASON TAXPAYERS GET LETTERS**—Because the estimated payments we enter on the tax return (based on the information you give us) does not match what the IRS received. They are occasionally wrong but most often it is the information we report that is wrong.