

What does client need to bring for Taxes 2021

Questions:

Are you and family members a US citizen?

If not must have ITIN.

Do you have photo ID, like driver license?

Do you receive wages?

Did you receive Unemployment?

Did you receive Social Security or Railroad Retirement?

Did you receive Canadian or Quebec pensions, or Old Age Security Plan from Canada?

Do you have a retirement Plan you receive money from?

Do you have Savings Interest or Dividends?

Do you have Investments? (Stocks, MF, etc)

Did you sell land or house?

Did you have Miscellaneous Income, Royalties?

Do you have a student loan?

Did you or dependent receive school grants, or scholarships?

Did you have qualified education payments?

Did you have a credit discharge?

Do you have a health savings account?

Other 1099 you may have.

Do you run a business on the side.

Do you pay property tax of rental fees?

Do you have any deductions?

Did you have medical insurance from employer based plan, marketplace, or other IRS plan?

Forms Needed:

Social Security Number for all on tax form.

Your ITIN Card.

Your Photo ID Card or driver license.

Your W-2

Your 1099-G

Your 1099-SSA or 1099-RRB (Green and Blue)

Your RRSP or RRIF form.

Your 1099-R

Your 1099-Int or 1099-Div

Your 1099-0ID and or 1099-B

You may have a 1099-S

You need your 1099-Misc. or 1099-NEC

You need a 1099-E

You need a 1099-T

You need a 1099-Q

You need a 1099-C

You need: 1099-HAS, 1099-SA, 1099-MSA

1099-K, 1099-A, 1099-LTC

You will expenses, supplies, cost of operation, mileage for business, etc.

You will need your rental cost, or taxes you paid on property.

Bring supporting documents.

Your 1095-A,B,C