Abbas, Jenson & Cundari, CPAs

What to provide to your tax preparer

New Clients:

- **Bring a copy of prior-year tax return**
- **Fill-out new client questionnaire.**
- **Social Security number(s) and Birthdate(s) for taxpayer, spouse, and dependents**

All Clients:

- **Proof of health insurance – Form 1095 from your insurance provider, your employer, or the health insurance exchange (federal or state)**
- **W-2's from all job(s) held during the year**
- **1099-G for any Unemployment or Paid Family Leave received during the year**
- **1099-Misc for any Miscellaneous Income received during the year**
- **SSA-1099 for any Social Security Benefits received during the year**
- **Alimony Received/Paid along with former spouse's Social Security Number**
- **Stimulus checks – Date and amount for funds received**

Did you earn Interest and/or Dividend Income? (Schedule B)

(Must claim interest and/or dividends earned if more than $10 in tax year)

- **1099-Int for Interest Earned in tax year**
- **1099-Div for Dividends Earned in tax year**

Do you own your residence? (Schedule A – Itemized Deductions)

- **Escrow closing statement(s) pertaining to any and all real estate transactions taking place during the year (i.e. Purchase, Sale, or Refinance)**
- **Form(s) 1098 for Mortgage Interest and Property Taxes (if impounded)**
- **Property Tax Statements with dates of payments (if self-paid)**
- **DMV Car Registration(s) for amounts paid during applicable tax year**
- **Charitable Contributions: Cash Given, Checks Written, or Goods Donated**
- **Unreimbursed Employee Business Expenses**
- **Significant Medical Expenses paid during year (must be more than 7.5% of Adjusted Gross Income before qualified as deductible) – Not a common deduction**

Did you make any Energy Efficient Improvements to your residence this year? (Form 5695)

- **Bring in your receipt for improvements such as insulation, energy-efficient exterior windows/doors, energy-efficient heating and air conditioning systems, and solar.**

Were you involved in a Foreclosure, Short-Sale, or any other Cancellation of Debt during the year?

- **1099-A or**
- **1099-C**

Did you securities during the year? (Schedule D)

- **For Stock Sales during the year, we need the following information:**
  - **Original Purchase Date of Stock Sold**
  - **Original Purchase Price of Stock Sold**
  - **Date of Sale**
  - **Sales Price of Stock Sold**
- **If you purchased, sold, or traded any virtual currency notify your preparer**

Did you take a distribution from your Pension Plan/IRA/401(k) or RollOver funds from one retirement plan to another during the year?

- **Form 1099-R for distributions and rollovers (including Roth IRA rollovers)**

Are you paying back student loans?

- **Form 1098-E Student Loan Interest Statement**

Did you incur any Educational Expenses during the year? (Form 8863)

- **1098-T Tuition Statement for tuition paid during the year**
- **Books & Supplies purchased during the year for classes taken**

Did you incur Child Care Expenses during the year? (Form 2441)

- **Name, Address, Phone Number, and Federal Identification Number/Social Security Number of Child Care Provider(s) (For each provider if more than one provider)**
- **Amount Paid to Each Provider during tax year**

Did you make any Estimated Tax Payments during the year?

- **Schedule of dates and amounts paid to each IRS and FTB**

Do you own Rental Property? (Schedule E)

(See Rental Property Schedule on our website)

For each property:

- **Total of all Rental Income collected during year**
- **Form 1098-Int for mortgage interest and property taxes paid**
- **Totals of expenses BY CATEGORY (i.e. total advertising, total repairs, etc.)**
  ** Property <u>purchased</u> or <u>refinanced</u> *this year?***
- **Escrow Closing Statement**
- **If property purchased in *prior year*, but converted to rental this year:**
- **Escrow Closing Statement from purchase**
- **List of improvements from the time of purchase to the time converted to rental property**

Are you involved in a Business Partnership, Limited Liability Company, or an S-Corporation?

- **K-1 from each business entity that you are involved in**

Do you operate your own business (Sole Proprietors)? (Schedule C)

(See Revenue & Expense List on our website)

- **Total of all Revenues**
- **Totals of expenses BY CATEGORY (i.e. total advertising, total supplies, etc.)**
- **Total of Self-Employed Health Premiums paid during the year**
- **List of equipment purchased during year (list by date, description, and amount) Automobile Expenses:**

- ***If Claiming Mileage* – □ Description of Auto**
    - **When Purchased or placed in service for business**
    - **Total miles driven during year (i.e. all miles put on vehicle)**
    - **Total <u>business miles</u> driven during year**
- ***If Claiming Actual Expenses* – □ Description of Auto**
    - **When Purchased or placed in service for business**
    - **Total Cost of Vehicle**
    - **Total miles driven during year (i.e. all miles put on vehicle)**
    - **Total <u>business miles</u> driven during year**
    - **Total cost of Gas during year**
    - **Total cost of Repairs/Oil Changes/Car Washes during year**
    - **Total cost of Car Insurance during year**
    - **DMV car registration paid during year**
    - **Total Interest Paid during year if purchased car and financing**
    - **Total Lease Payments made during year, if leasing**