

ORGANIZE YOUR TAXES



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www.4rsaccounting.com

- ✓ Gather your tax related documents
- ✓ Use the checklist below
- ✓ Place all your documents in this envelope
- ✓ Make sure to include your name & phone

CALL us to schedule your tax appointment or drop-off:

559-272-8120

Date: _____ Time: _____

HOW TO PREPARE FOR YOUR TAX APPOINTMENT

Gather together the following documentation and bring to your tax appointment:

Get Started

- Copy of last years' taxes (if you are a new client)
- Your Social Security number, Driver's License and birthdate (& spouse's if applicable)
- Social Security numbers and birthdates for your children and/or other dependents
- Estimated taxes paid during the year
- Both the 1095-A Covered California health insurance forms for you, your spouse, children/other dependents
- Bank account and routing numbers for direct credit/debit of your refund or amount owed**

Gather Your Income

- W-2s from your employers; **final paystub for overtime**
- 1099-NEC forms for self-employment income
- K-1 forms for income from a partnership, small business, or trust
- 1099-SSA forms showing Social Security received
- 1099-R forms for retirement distributions
- 1099-G State refund, unemployment
- 1099-K reporting all payment transactions
- Other income: self-employment, rental, farming, W-2G gambling income, etc.
- Alimony – if received before 2019 or paid per divorce agreement. Not applicable 2019 and after.

Check Your Investments

- 1099-INT (interest) forms
- 1099-DIV (dividends) forms
- 1099 Brokerage Statements

Include Your Deductions

- 1098-T forms reporting tuition plus all original paid receipts for tuition, books, supplies, etc.
- 1098-E forms reporting student loan interest
- 1098 forms reporting Mortgage interest
- Automobile loan interest letter from lender**
- Real estate taxes
- Daycare or childcare costs
- Other expenses – college, medical, dental, solar, self-employment, rental, farming, unreimbursed employee (for California only)
- Contributions to traditional or SEP-IRA
- Gifts to charities and churches

Dependents

- We strongly advise that we prepare your dependent children's tax returns, especially if that child is a student. This insures all information matches when the IRS electronically crosschecks returns.

And all questions and documents you may have related to this year's tax return (new items above in red)