

# ORGANIZE YOUR TAXES



437 Laverne • Clovis, CA 93611

Ofc: (559) 272-8120 • Fax: (559) 297-4974

[www.4rsaccounting.com](http://www.4rsaccounting.com)

- ✓ Gather your tax related documents
- ✓ Use the checklist below
- ✓ Make sure to include your name & phone

**CALL** us to schedule your tax drop-off: **559-272-8120** Date: \_\_\_\_\_ Time: \_\_\_\_\_

**Or even easier, MAIL or DROP-OFF** your documents in our front door mail slot, and we'll call with questions and/or to set up a time to sign, pay and pick up your completed return.

## 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
- Social Security numbers and birthdates for your spouse, children and/or other dependents
- Estimated taxes paid during the year
- 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
- 1099-MISC 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
- Other income: self-employment, rental, farming, W-2G gambling income, etc.
- Alimony – if received before 2019 or paid per divorce agreement. 2019 and after, no longer an income or expense per divorce agreement.

### 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
- 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 and Notice 1444

- 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.
- Notice 1444 if you received a \$1200 Stimulus Payment

And any and all questions and documents you may have related to this year's tax return