FORMS LIST

Please bring a completed copy of the worksheet/organizer which can be found https://northglenntax.com/tax-worksheets. Call the office if you would like us to mail a copy to you, 303-457-9263. Also bring any supporting documentation.

PERSONAL INFORMATION:

- Prior two years income tax returns and two forms of identification **(new client)**
- Name, address, Social Security number and Date of Birth for yourself, spouse and dependents-list on worksheet.
- Market Place Form—must have **1095A** form if you received insurance through the exchange.
- Banking information for Direct Deposit

INCOME DATA REQUIRED:

- Wages (w-2s) and year end paystub
- IRS Notice 1444—reporting Economic Impact Payment received. If you did not save this form, check IRS.gov website. You are not taxed on this income but it needs to be reconciled on the 2020 tax return.
- Interest and/or Dividend Statements(1099-Int/1099-Div)
- State/Local Income Tax Refunds(1099-G)
- Unemployment Compensation(1099-G)
- Pension/Annuity Statements/IRA Distributions (1099R)
- Stock/Bond Sales Statements(1099B)
- Social Security Income Statement (SSA-1099)
- Royalties/Partnership/SCorp/Trust/Estate Income—usually on a K-1
- Gambling(w-2G)/Lottery Winnings and Losses/Prizes/Bonus
- Alimony Income-Divorce final on or prior 12/31/2018
- Rental Income—see additional worksheet on website
- Self-Employment Income/Contract Labor (1099-NEC)/Business Income—see additional worksheet on website
- Hobby Income
- Any foreign income, bank accounts and or info about property owned outside of the USA
- Any other income items not listed

EXPENSE DATA REQUIRED:

- Dependent Care Costs and Provider Name, Address, Tax ID # or Social Security # and amount paid.
- Education/Tuition Costs/Materials Purchased/Room &Board—**must have 1098-T from Institution** Account transaction history for 2019 year with loan disbursement records, and receipts for out of pocket expenses.
- 529 Education Plan contributions/distributions(1099-Q)
- Student loan interest (1098-E)
- Alimony paid—divorce prior to 12/31/2018
- Medical/Dental Expenses
- Long-term Care letters
- Mortgage/Home Equity Loan Interest/Mortgage Insurance
- Real Estate Taxes
- Sales taxes on big ticket items—cars, RVs, etc.
- Charitable Contributions Cash/Non-Cash—you need to have receipts for all deductions
- IRA Contributions/Retirement Contributions
- Home Purchase/Sale documents
- Moving Expenses—military only
- Estimated tax payment records—list on worksheet.