

Pamela Price EA Inc.

Pamela Price EA & Associates
Enrolled to practice before the Internal Revenue Service

Checklist of Things Needed to Prepare Your Return:

In addition to your Basic & other (hopefully completely filled out) worksheets:

- Copies of ALL your **W-2s, Form 1099-Rs, 1099s** (all types) & **K-1 Forms**.
- Economic Impact Payment** (aka Stimulus) information (**IRS Notice 1444-C or Letter 6475**)
- Advanced payment of Child Tax Credit** (**IRS Letter 6419**)
- 2020 escrow statements** (Includes **purchases, sales, and refinances** of homes & rentals)
- Property tax bills** for homes, investment, or rental properties.
- All documentation related to sales of stocks** (1099-B Forms and either Statement of Realized Gains & Losses, buy slips, or your own accounting of purchases cost & dates)
- 1099 Forms for unemployment (1099-G), state tax refunds (1099-G), and social security benefits (SSA-1099)**.
- 1099-R Forms for IRAs and other retirement accounts**.
- 1099-NEC or 1099-MISC Forms for nonemployee compensation or rents**.
- 1098 Forms on homes, rental properties, vacation homes, and time shares**. This includes statements for loans which were refinanced or paid off during the year. When your lender changes during the year, there will usually be two 1098 forms.
- Record of **Federal and State Estimated Tax Payments**. Your “*Basic*” worksheet has a place to make these entries.. **Remember:** The 4th estimate was due 1/15/2022 so you may have to look in this year’s records for that figure. **It still counts as last year**.
- Information for **child care credit**. This includes names, addresses, phone number, and social security numbers or employer’s ID number (EIN) – sometimes called a 95 number – and **separate totals for each** babysitter, preschool, or other providers.
- Social security numbers** for ALL dependents (if not previously provided). You cannot file with a missing number.
- Copy of 2019 tax returns (NEW CLIENTS ONLY)**.
- Any **IRS or FTB correspondence** received during the year.
- Form 1095-A** for those whose health coverage was through a marketplace, such as **Covered CA**. If so, you must download this form from their website and send it to us. **And new for 2020: California residents will also have Form FTB 3895**, which can also be downloaded from coveredca.com