JLPOLLACK CPA
PLLC

2021 FORM 1040 CHECKLIST

DO NOT STAPLE tax documents
Provide Prior Year Tax Returns if not prepared by JLPollackCPA

INCOME

______Did you receive a stimulus check? If so, how much? Please send IRS Letter 6475
______Did you receive advanced child tax credits? Please send IRS Letter 6419 for each taxpayer on the tax return
______W-2 Forms
______Dividends and interest – Form 1099-DIV and Form 1099-INT
______Sales of Stocks and Bonds, Crypto – Form 1099-B and Cost Basis Information if not provided
______Alimony – Need SSN of Payer and Amount, Divorce Date
______Unemployment – Form 1099G
______Social Security – SS Income Form
______Gambling winnings – Form W-2G or 1099, and losses that are deductible up to amount of winnings.
______Cancellation of Debt – Form 1099-C.
______Business Income – Provide income and expense information, including any 1099-NEC or 1099-MISC
______Rental property – Provide income and expense information, including any 1099-NEC or 1099-MISC
______Sold or purchased real estate – Provide closing statement (HUD-1) for each transaction.
______IRA, Pension, Qualified Education Plan Distributions - Form 1099-Rs, Form 1099-Q
______Partnership, S Corporation, Trust income - Provide K-1s.
______Foreign bank accounts – Provide amount of highest balance during 2021.
______IRS Identity Protection PIN

DEDUCTIONS

______IRA, SEP, SIMPLE, Roth IRA – Provide contributions
______Medical Expenses – Provide Form 1095-A if applicable
______Real Estate taxes – Form 1098 or Tax bill
______Mortgage interest – Form 1098
______Cash or Non-Cash Charitable Contributions – Provide Cash Amounts and Non-Cash Receipts
______Property Taxes Paid on Automobiles/Boats/Land/etc – Provide Amount
______Student Loans – Form 1098E
______Child care - Provide name, address and EIN of child care provider and amount paid.
______Tuition Expenses – Provide 1098T and 1099Q if applicable
______Alimony paid? – Need SSN of recipient and amount, Date of Divorce

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