JLPOLLACK CPA
PLLC

2022 FORM 1040 CHECKLIST

DO NOT STAPLE tax documents. $100 additional fee for documents dropped off at the office
Provide Prior Year Tax Returns if not prepared by JLPollackCPA

https://jlpollackcpa.firmportal.com
The Firm Portal accepts PDF, DOC(X), XLS(X), JPG, and PNG files. Please differentiate each file name.

INCOME

______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.
______HSA Withdrawal – Form 1099-SA
_______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
______Childcare - 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
______Any Estimated Taxes Paid? Please provide amounts and dates.

Income and expenses should be provided **in total by category. Receipts and bank statements will not be accepted.*

11220 Elm Lane, Suite 205B   Charlotte, NC 28277