DeVa Association Tax and Bookkeeping Services LLC.

-Your Partner In Success-

MOST PEOPLE WILL NEED:

This information tells the IRS exactly who's filing, who is covered in your tax return, and where to deposit your tax refund:

Personal Information:

☐ Social security numbers and dates of birth doe you, your spouse, your dependents (**Not required if you are a prior customer but is required if you have a new addition)**

☐ Copies of last year's tax return for you and your spouse **(required for our tax office- we don't want to miss out on reporting any possible income or tax reductions)**

☐ Picture ID **(not required if you are a prior customer and your address or name has not changed from the previous tax year) Information about your income:**

☐ **W-2 Forms** for you and your spouse

☐ **1099-C Forms** for cancellation of debt

☐ **1099- G Forms** for unemployment income, gambling winnings, or state or local tax refunds

☐ **1099-Misc Forms** for you for miscellaneous income such as rents, prizes, awards, medical and healthcare payments.

☐ **1099- NEC Form** for non-employee compensation payments such as work a gig job delivering, driving, etc.

☐ **1099- R Form 8906** for payments/ distributions from IRS's or retirement plans

☐ **1099-S Forms** for income from the sale of a property

☐ **1099-INT, DIV, B, or K-1 Forms** for investment, dividend, bonds, stocks, or interest income

- **SSA-1099 Form** for Social Security benefits received
- **Alimony** received (you can review bank statements or intermediary statements to confirm the total dollar amount)
- **Business or farming income** – Profit/loss statement, capital equipment information
- **Rental Property income and expenses** – Profit/Loss statement, suspended loss information
- **Prior Year installment sales information – Forms 6252**, principal interest collected during the year, SSN, and address for payer.
- Miscellaneous income: jury duty, gambling winnings and loss, Medical Savings Account, Scholarships, etc.

Other Information:

- **Child Tax Credit Form 6419-** Advance Child Tax Credit Payment
- **Economic Impact Payment Letter 6419 – provides the total of tax EIP payments that you have received.**
- **PPP LOAN FORGIVENESS STATEMENT:** you will need to provide this as an attachment to your return such as a statement that you applied or applying for section 3.01(1)(2), or (3) of Rev. Proc.2021-48 and for what taxable year (2020-2021) you received or requested forgiveness of the loan, the statement also must state you had or had not been granted forgiveness of the loan. Statement must include your wet signature.

Adjustments to your income:

- **Form 1098 -E** of student loan interest that you paid (or loan statements for student loans)
- **Form 1098- T and Full tuition statement** – for tuition you paid (or receipts for post -high school)

- **For teachers:** Bank statement, canceled check, or receipts for expenses paid for classroom supplies, etc.
- **Record of IRA contributions** made during the year
- **Receipts** for any qualifying energy-efficient home improvements (solar, windows, etc.
- **Records of Medical Savings Account (MSA) contributions**
- **Self-employed health insurance payment records**
- **Records of moving expenses**
- **Alimony paid**
- **Keogh SEP, SIMPLE, and other self-employed pension plans**
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If you itemize your deductions:

The government and some states allow a number of deductions and credits to help lower the tax burden on individuals, which means more money in your pocket. You'll need the following documents to make sure you get all the deductions and credits you deserve:

- **Rent Cost:** some states allow this as a deduction (Provide the section of the lease that outlines the monthly rent payment amount or a receipt showing the amount of rent and the start date of the lease)
- **Child Care Cost:** providers name address, Tax ID or SSN, and amount paid
- **Education Cost: Form 1098-T**, education expenses
- **Adoption Cost:** SSN of child, record of legal, medical, and transportation cost
- **Forms 1098: Mortgage Interest,** private mortgage insurance (PMI), and points you paid
- **Investment Interest expenses**

- **Charitable donations:** cash amounts, official charity receipts, canceled checks, value of donated property: miles driven and any out-of-pocket expenses
- **Medical and dental expense record- that** shows the item paid in full
- **Casualty and theft losses:** amount of damage, insurance reimbursements.
- **Records of home business expenses:** home size/office size, home expenses **(you must own and have business income) Taxes You've Already Paid:**

- **State and local incomes taxes** you paid
- **Real estate taxes** you paid
- **Personal property taxes** you paid during the tax year
- **Vehicle license fees** that are based on the value of the vehicle
- **Estimated tax payments** made during the year **(if you own a business and are self -employed)**
- **Prior -year refund requested to be applied to current tax year and / or** any amount paid with an extension to file