allworth Tax Solutions

Tax Preparation Form & Info Request List

Please provide electronic (pdf) copies of the following items for your tax return preparation, as applicable. You may use the Liscio application to take copies of documents using your smart phone and securely send them to us. If mailing info to us, please DO NOT send originals.

1.	Copy of your prior year federal and state tax returns (for new clients only).
2.	Changes to your bank account information used for tax refund direct deposits or electronic tax payments, if applicable.
3.	1099-G for state and local tax refunds or unemployment compensation.
4.	Series EE U.S. savings bonds issued after 1989 and cashed in to pay qualified higher education expenses for yourself, your spouse, or your dependents.
5.	IRS issued Identity Protection PIN (IP PIN), if applicable.
6.	W-2 forms from each employer during this tax year.
7.	IRS Letter 6475, Your Third Economic Impact Payment, if you received a payment in 2021.
8.	Letter 6419, 2021 Advance Child Tax Credit, for CTC payments received in 2021, if applicable.
9.	1095-A, Health Insurance Marketplace Statement, or related state forms such as California Form 3895,if applicable.
10.	1099-INT & 1099-DIV forms for Interest and dividend income.
11.	1099-R forms for pension and retirement accounts (only required for non-Allworth Financial managed accounts).
12.	SSA-1099 for Social Security.
13.	1099-NEC, 1099-MISC, and 1099-K forms.
14.	1099-B forms for the sale of securities, and cost basis if not provided on the 1099-B or a statement from the broker (only required for non-Allworth Financial managed accounts).
15.	W-2G forms for gambling winnings or lottery proceeds.
16.	1099-C or 1099-A for any cancellation of debt income or foreclosure of a residence.
17.	1099-SA for distributions from Health Savings Accounts (HSA) and Archer Medical Savings Accounts (MSA) and 5498-SA for contributions.
18.	1099-Q forms for education distributions from 529 and Coverdell accounts.
19.	1099-QA and 5498-QA for ABLE accounts.
20.	1098 forms for mortgage interest, home equity loan interest, and real estate taxes paid in this tax year.
21.	1098-E Student Loan Interest Statement.
22.	1098-T forms received from educational institutions for tuition and fees paid during the tax year.
23.	Schedule K-1's from partnerships, S corporations, trusts, and/or estates.

24.	Records regarding rental income and expenses.
25.	Alimony paid or received, including name and social security number of recipients for divorces finalized prior to 1/1/2019. (New clients: please provide a copy of your divorce decree).
26.	Title and escrow closing statements for the purchase, sale, or refinance for all real estate.
27.	Summary of medical and dental expenses paid in this tax year, including insurance reimbursements.
28.	Schedule of estimated taxes paid this year for federal, state, and local taxes.
29.	DMV Vehicle License Fees paid for this tax year.
30.	Unreimbursed job-related expenses are currently not deductible for federal purposes but some states, including CA, still allow them. If your state of employment allows these expenses, please provide or ask us about them.
31.	Child-care expenses and provider information, including name, address, phone number, and tax identification number.
32.	Information on educational expenses for possible tax credits.
33.	Social security numbers and dates of birth for any new dependents.
34.	Moving expense details for active-duty U.S. Armed Forces members.
35.	Records regarding vehicles purchased or leased in this tax year if claiming business use.
36.	Summary of any losses due to damage, fire, theft, or natural disasters.
37.	Itemized list of charitable donations for all donations claimed, including cash, clothing, and household items. If you housed an exchange student sponsored by a qualified organization in 2021, provide the number of school months the student lived with you. In general, for donations of cash that are less than $250, a bank record is needed to substantiate the deduction; for cash donations of more than $250, a letter from the charitable organization is also necessary prior to filing the return.
38.	1099-LTC Long Term Care and Accelerated Death Benefits.

Additional questions or comments:

Please visit our website AllworthTaxSolutions.com for a list of additional tax checklists, organizers and occupational worksheets that will help you gather your tax information and make sure you don't miss any important deductions. Thank you.

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