

# James R. Kist CPA, P.A.

## Things to Bring List

### Be sure to Bring All of the Following with You:

1. Copies of W-2
2. 1099 forms reporting all:
  - Interest & Dividends from Savings Accounts, Money Markets, Mutual Funds, Stocks, Bonds, Etc.
  - Non-Employee Compensation
  - Unemployment Compensation (**Insurance**)
3. 1099 forms reporting all Stock sales for 2021 as well as original purchase date and cost information
4. 1099 forms for all Retirement Fund transfers and Social Security benefits
5. Social Security numbers and dates of birth of all dependents (**if not previously supplied**)
6. Copies of all K-1's (**Partnership and S Corporation**)
7. Schedule summarizing business or rental income and expenses if applicable
8. Date and amount of each estimated tax payment
9. Name, address, I.D. or Social Security number of all child care providers and amounts paid for each child per provider
10. Itemized Deductions:
  - Medical Expenses
  - Real Estate Taxes
  - Mortgage Interest
  - Home Equity Interest
  - Investment Interest
  - Contributions, Cash and Non-Cash
11. Copy of 2020 Tax Return (**for new clients only**)
12. Closing Papers for:
  - Purchase of NEW Residence
  - Sale of OLD Residence in 2021
  - Purchase of OLD Residence
  - Any Refinancing done in 2021
13. Alimony (**paid or received**) – Need to/from name, Social Security number, amount and date of original settlement
14. If assigned, the IRS issued Identify Protection PIN for Taxpayer and/or spouse for Tax Year 2021
15. Year End IRA and 401K Statements
16. December 31,2021 Non-Retirement Investment Statements
17. Exact amounts received (**by Taxpayer and spouse, if applicable**) for Stimulus Payment **#3**
18. Letter 6419 – IRS will issue this letter showing the total amount of advance Child Tax Credit payments that were disbursed to you during 2021