



Name(s) \_\_\_\_\_  Check here if changed since last year

New address: \_\_\_\_\_

Best Phone Number to contact you: \_\_\_\_\_ Secondary Number: \_\_\_\_\_

Email Address: \_\_\_\_\_

Check here if you have any dependents not included on prior year return

Table with 4 columns: Name, SS#, Date of Birth, Relationship to taxpayer

DID YOU RECEIVE ANY STIMULUS MONEY? Y/N \_\_\_\_\_ HOW MUCH? \_\_\_\_\_

Income Documents

- W-2 Forms from all employers
1099-Misc or NEC Forms (contract work over \$600).
Investment income information 1099-INT, 1099-DIV, 1099-B
Retirement (1099-R)
Income from local and state tax refunds from the prior year (only if you previously itemized) (1099-G)
Business income (Schedule C income/Expenses or K-1)
Unemployment income (1099-G)--check the state website if you do not receive it via mail
Rental property income (Schedule E or F Income/Expenses)
Social Security or Railroad Retirement benefits (1099-SSA or 1099-RRB)
Health savings account distribution (1099-SA)
Miscellaneous income (including: alimony received, jury duty, lottery and gambling winnings (W-2G), Form 1099-MISC for prizes and awards, and Form 1099-MSA for distributions from medical savings accounts)

Adjustment Documents

- IRA contributions (might have 5498)
Student loan interest-Form 1098-E
Health/Medical Savings Account (HSA/MSA) contributions (Contributions through employer are on W-2)
Self-employed health insurance amount
Alimony Paid (including Name and SSN for person paid)

Deduction Documents—Standard deductions are \$12,400 Single, \$18,650 Head of Household, and \$24,800 Married filing Jointly. If you do not have that much in deductions, then you do not need to provide us with these documents.

- Mortgage Interest (Form 1098)
Real Estate Taxes (usually included on mortgage statement)
Property taxes on Vehicles

Charitable contributions—This year you are allowed up to \$300 in charitable contributions even if you do not itemize deductions. This is "cash" donations, so those made by cash, check, or credit card (not items).

- Medical expenses (over 7.5% of your income)

Other Info for Credits

- Education costs (Form 1098-T) plus costs of books/supplies
Childcare costs (Name, Address, and SSN/EIN for care provider plus amount paid)

Health Insurance

- Marketplace Form (1095-A)—if you had insurance through the marketplace for any part of 2020 (with or without a subsidy) we need the 1095-A. They most likely mailed it, but it is also available on healthcare.gov website if you have an account. If we do not include this it may hold up processing.
Other insurance (1095-B or 1095-C)—Not required for filing.

If you have a refund would you like it to be Direct Deposited?  Yes  No

If you have a balance due would you like it auto debited (IRS, KS or KCMO only)?  Yes  No

Bank Routing Number: \_\_\_\_\_ Your bank account number: \_\_\_\_\_