



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

Name	SS#	Date of Birth	Relationship to taxpayer
_____	_____	_____	_____
_____	_____	_____	_____

DID YOU RECEIVE THE THIRD STIMULUS PAYMENT? Y/N _____ HOW MUCH? _____

DID YOU RECEIVED AN ADVANCE CHILD TAX PAYMENT? 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), etc)

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)
- Alimony Paid (including Name and SSN for person paid)

Deduction Documents—Standard deductions are \$12,550 Single, \$18,800 Head of Household, and \$25,100 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/\$600 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 2021 (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: _____