

Please BRING this paper with you to your appointment



8903 W. Sunset
Wonder Lake, IL 60097
(815) 728-1996

INCOME & Expenses:

If you do not understand or are not sure if something applies to you, PLEASE bring this with you and we will review this together. ☺ Pixie

DOCUMENTS REQUIRED:

1. Bring Charity document showing Cash or Check Only contribution of at least \$300 (\$600 -MFJ) for NEW Standard Deduction.
2. If NEW CLIENT bring copies of 2019 and 2020 returns and 2021 returns.
3. Legal Photo ID and Social Security Card.
4. 1099-K and information., Bring Virtual Currency documents!!

THIS YEAR IRS MORE IRS required documents for when dependent children are on tax return!!

1. Social Security Card, Birth Certificate, Driver's License (if driving). *(If already on file with us, omit)*
2. If under 18, documentation from School showing residence and residential parents: school registration for online classes is acceptable for Spring and Fall 2021. Home school registration is acceptable.
3. If Pre-School Age, then day care document, doctors bills showing custodial parent address and child's address is the same or any document showing they were home with you as you worked from home (If possible).
4. If dependent is 19 – 24 years and full-time student: for Education Credit MUST have Form 1098-T and account transcript from college showing *entire account of charges and payments with DATES*. (Remember include Book Receipts for deduction.) Also Scholarship information.
5. If you are Head of Household must bring documents to prove you supported children and children are with you. (Utility bills, Lease with children's names, etc.) PLEASE CALL FOR MORE INFORMATION.

Forms and Documents (Income & more)

- W-2 ____; 1099-R ____ (if Rollover, bring proof of Rollover; *Also bring end of year statements for all Retirement Accounts*); SSA-1099(Social Security) ____; RRB-1099 or Other Retirement Annuity ____
- Medical Related: Form 1095-A ONLY; Also Form 1099-SA (HSA Medical) & Form 5498-SA (HSA, MSA)
- W-2G__(Gambling: bring proof of losses per type of bet per day); 1099-G (Unemployment Income Statement ____ & 1099-G State Tax Refund (from all years if proceeds received____ 1099-INT ____ 1099-DIV____; Municipal Bond Interest ____; *Bring ALL documents from Broker end of year and tax statement*; 1099-B & sales of stocks, bonds____(number of statements attached); Attach all stock sale transaction information. 1099-S (real estate sale) attach all escrow statements & initial costs)____
- Forms 1099-Misc & 1099-NEC. _____(number of forms); ____ 1099-K ____ 1099-A (abandonment/foreclosure) & ALL 1099-C____
- Schedule K—1 ____ (Partnerships, S-Corporations, Trust or Estate Income)
- ALL information about any funds or ownership you have in any Foreign Account**.
- Alimony Received ____ Or Alimony Paid ____ to (Name of receiver of alimony)____& (Social Security Number AND copy of divorce decree.)- Unless we already have on file.
- Form 1099-Q
- Roth & IRA contributions
- Jury Duty____; Unreported Tips____; Disability Income ____; Any other Income from Bartering or Hobby ____; Elections Worker ____
- ILLINOIS K-12 bring registration sheets showing costs for Private or Public schools all fees paid for tuition, lab fees, Driver's Ed, book fees, book rental and any field trip receipts. (Homeschoolers bring actual receipts)!!!!

- **BRING **Settlement Statements**____; (if Sold or Bought or Refinanced in 2021, 2022, 2023 bring Settlement Statement)
- Donation information to any Illinois College Savings Plans

Retirement Contributions

- IRA Contributions for 2022:** _____
- ROTH Contributions for 2022:** _____
- **SEP, Keogh, Individual 401(k) or SIMPLE contributions** _____
- **Do you want to make a contribution in 2023 for 2022 prior to April 2023?** ___
- If Form 1099-Misc is for BUSINESS, Rental, or Farm then attach the 1099-Misc to an “Income and Expenses” document for that Business, Rental, &/or Farm. ****See website www.abptaxservices.com for helpful sheet to organize this information. For more detailed help go to “Client Resources to Log-in and have access to Specialized Worksheet to detail Income and Expenses.
- Business, Rental, Farms: Include a list of all new equipment acquired this year, including date of purchase and cost.