

SMITH, KUNZ & ASSOCIATES

◆ CERTIFIED PUBLIC ACCOUNTANTS ◆

What Tax Documents to Provide

INDIVIDUALS

The tax documents you have depends entirely on your situation – kids vs. no kids, single college student vs. retired couple. Here is a general list to assist you in determining which documents to provide Smith, Kunz & Associates.

- Personal Information
 - Your social security number or ITIN
 - Your spouse's social security number or ITIN
 - Information regarding your stimulus payment (Economic Impact Payment)
 - This was likely received in the first quarter of 2021
 - Updated mailing address, phone number, and email address
 - Bank routing and account numbers
 - Filing status
- Dependent Information
 - Name, date of birth, and social security number or ITIN
 - Childcare expenses incurred for parent to work
 - Please include EIN, SSN, or ITIN of the childcare provider
 - Income of dependent(s)
 - Information regarding your Advance Child Tax Credit (ACTC), letter 6419 from IRS
 - This is for the monthly payout you may have received from the government during 2021

- Income
 - W-2's
 - 1099's
 - Cryptocurrency transactions
 - Traditional IRA basis (amount contributed to IRA that was already taxed)
 - Rental income and asset information
 - W-2G (Gambling income)
 - Trust income
 - Jury duty records
 - Alimony received or paid
 - Please include name and SSN of ex-spouse
- Deductions
 - 1098 (Mortgage statement)
 - 5498 (Retirement contributions)
 - Cash and non-cash charitable contributions
 - Healthcare documents (1095-A, 1095-B, 1095-C)
 - Amount of income tax or sales tax paid
 - Receipts for energy-saving home improvements
 - Education
 - 1098-T (Tuition statement)
 - 1098-E (Student loan interest)
 - Receipts for qualified educational expenses
 - Receipts for classroom expenses (If a K-12 educator)
- Estimated tax payments made to the IRS or State.

BUSINESSES

Business tax documents vary widely based on your business type and size. Please use the following as a guide only. If you would like assistance categorizing your unique business expenses, our team of bookkeepers and QuickBooks professionals is happy to assist you.

- Income
 - 1099's
 - K-1's
 - Income records
- Expenses
 - Sales tax
 - Rent
 - Tools/Small equipment
 - Labor/Payroll expenses
 - Food
 - Vehicle
 - Mileage used for business purposes
 - Insurance on vehicle
 - Repairs or maintenance
 - Gas
 - New vehicle purchased in 2021, date of purchase and price
 - Big purchases
 - Cell phone bill
 - Uniforms with logos (Clothing specifically for work)
 - Office supplies
 - Advertisements
 - Internet
 - Legal/Professional Fees
- 1040-ES (Record of estimated tax payments)
- Home office information