

Checklist for 2021 Returns - Information needed for:

Everyone			
How are you sending tax documents to us?			
* Portal			
* Dropping Off			
* Mailing			
How are we sending completed returns to you?			
* Portal			
* Pick up			
* Delivering			
* Mail			
Individual			
Form 1099-G	Did you collect Unemployment Benefits in 2021?	YES	NO
Drivers License - if renewed or changed in 2021	Photo Copy front and back		
Bank Account	Has it Changed/ Confirm last 4		
In the event you owe taxes would you like direct debit from your bank account		YES	NO
Advance Child Tax Payments - if not sure, you can go to the link provided *See below for instructions*	https://www.irs.gov/credits-deductions/child-tax-credit-update-portal	\$	
		March 2021	
Economic Impact Payment (Stimulus) *see below for instructions on retrieving info online*	https://www.irs.gov/coronavirus/get-my-payment	\$	
Address	Is there any change?		
1095 A/B/C - Health Insurance	Do you have this form?		
Charitable Donations	Approx amount	YES	NO
Virtual Currency - ie. Bitcoins		YES	NO
At anytime during 2021 did you rec., sell, send, exchange, or otherwise acquire financial interest in virtual currency			
Business			
Tax Return Signer	Any change in Signer? if so, Name, Address and SSN		
W-2's	Need to know how many		
1099	Need to know how many		
K-1 for Partnerships/S-Corps	Has there been an address change?		
Bank Account	Changed/Confirm last 4		

3rd Stimulus payment online retrieval

1. Go to link provided on sheet
2. In the center of the page, select 'Get My Payment'
3. Enter required info (If joint return - use taxpayer's info)
4. The date & bank account used for the payment is provided

Child Tax Payments online retrieval

1. Go to link provided on sheet
 2. Click on View Advance Payments
 3. Create an account or login
- This will require email, password and identity verifications