

Attachment to Taxpayer Intro Letter

ORGANIZATION OF TAX RETURN DOCUMENTS

Prior to your meeting with an ATP Assister and to ensure the most efficient use of your time, please collect and organize your tax documents, worksheets and other papers using the checklist below:

INCOME

- W-2 Wages
- 1099-G Box 1 Unemployment (you may need to download this prior to the meeting)
- 1099-G Box 2 State and local refunds
- 1099-INT Interest
- 1099-DIV Dividends
- SSA-1099 (the one with the pink stripe)
- 1099-R/RRB 1099R
- 1099-Misc
- 1099-NEC Non-Employee Compensation
- 1099-B Proceeds from Broker Transactions
- W-2G Gambling Winnings
- 1099-Q Qualified Education Program
- 1099-C Cancellation of Debt
- K-1 Partnership or trust
- Alimony
- Advanced Child Tax Credit payment received *per IRS Letter #6419*
- Economic Impact Payment received in 2021 *per IRS Letter #6475*
- Other Income not listed

ADJUSTMENTS

- Health Savings Account
- IRA contribution
- Student Loan Interest
- Educator Expenses
- Alimony Paid

DEDUCTIONS

- Medical and Dental expenses, summarized by following categories
 - Medical/Dental/Vision Insurance
 - Doctor/Dentist/Other Medical Specialist
 - Prescriptions
 - X-rays, Lab Work, etc.
 - Hospital
 - Medical Aides

- Mileage
- Other

___ Taxes you paid (E.g. Property taxes, estimated taxes, sales tax on large items)

___ 1098 Mortgage Interest

___ Gifts to Charity totals – cash and/or noncash

___ Business Expenses summarized by category (see IRS Schedule C for categories)

- Note: for business mileage, total vehicle mileage for the year is needed.

CREDITS

___ 1098-T Education Credits

___ Residential Energy Credit

___ Child Care

HEALTH INSURANCE from the MARKETPLACE

1095-A Health Insurance Marketplace Statement

Updated 12/26/2021