



Cannon Tax & Accounting, Inc. Tax Return Checklist

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Personal Information:

- Change of address / Change of occupation
- Current email address & phone number
- Change in filing status
- Add / Remove dependent(s)
- Drivers license / State ID number and state issued

New Client:

- Copy of prior year tax return
- Voided check for direct deposit of refunds
- Date of Birth (All family members)

Income and Source Forms:

- Wage Statements - Form W2 Qty_____
- Interest Income - Form 1099-INT Qty_____
- Dividend Income - 1099-DIV Qty_____
- Sale of Stock - 1099-B Qty_____
- Receive any alimony - Need date of agreement & Amount Received
- Unemployment - Form 1099-G
- Jury Duty pay
- Receive a state income tax refund - Form 1099-G
- Cancellation of debt - Form 1099-C
- Gambling winnings - Form 1099-G or W2G
- Pension or Retirement distributions - Form 1099-R
- Social Security - Form 1099-SSA
- Sole proprietor income - Form 1099-MISC
→please see business worksheet
- Rental Property
→please see rental worksheet
- Partnership/Trust/Estate/S-Corp - Form K-1
- Sell a Property/House - Form 1099-S
please bring closing docs from the sale & need initial purchase price and date
- Foreign Bank account detail
- Receive an inheritance
- Receive a death benefit

General:

- Moving Expenses (Active Military Only)
- Pay any alimony - amount and who paid to SS# & need date of agreement
- Full time educator (K-12), need educator expenses
- Student loan interest or Tutiton? Form 1098-T

Stimulus Payments:

Total Stimulus Received:

First Round \$1200 per adult	\$	_____
\$500 per dependent	\$	_____
Second Round \$600 per adult	\$	_____
\$600 per dependent	\$	_____

FAFSA:

Let us know if you need your return completed for FAFSA.

Deductions:

- Medical expenses - please see medical worksheet
- Property Tax on Real Estate
- Mortgage Interest
- Purchase a new house -Closing Documents
- Property Tax on vehicles
- Charitable contributions/Non-Cash Contributions
- Volunteer Expenses / Miles
- Year end (December) statements for IRA / Roth
- Gambling losses (deduct up to winnings)
- Childcare Expenses / Provider information

Estimated Tax Payments:

- Any Federal and/or State Estimated Tax Paid
~need amount and date paid for each quarter

Health Insurance:

- Were you covered any months of the year through the Affordable Care Act?? Form 1095-A
- Contribute/Distribute to a Health Savings account
- Contribute to a long-term care account

Note: Please see the additional worksheets that go into more detail on several items above. Additional material may be requested from you during the interview proces or for clarification. Questions??? Please call 704-849-2199 or email us at admin@cannonaccounting.com