

Thank you for your continued business support in Your Tax Matters, LLC  
 Use this checklist and envelope to help organize your 2021 tax info (for the 2022 tax season).

Your Tax Matters, LLC	
Tax Related Income, Credits and Deductions Checklist	
Basic Information	Additional Activities to Remember
Full Names, SSN, birth dates for all	1099-G Unemployment income, or refunds
Address, phone number, e-mail address	1065 K-1 Partnerships, trusts
ID (SS cards and Driver's License, etc.)	1120 Corporations and 1120-S S-Corps
2020 income tax return copy (new clients), income, filing status, dependents	1095A Health Insurance Marketplace
Income / Investments / Retirement	Economic impact payments 1, 2, 3
Earned wages - W2's including foreign, jury duty, etc.	Advance child tax credit payments
1099-MISC and 1099-NEC Income (contracting, rental, royalties)	Foreign bank accounts
1099-INT, 1099-DIV, 1099-B, (financial docs for int, div, asset sales)	Virtual currency activities
Rental properties and/or royalties	Itemized Deductions
1099-R pension and annuity distributions	Health care/long term care insurance prems, medical copays, prescripts, mileage
SS-1099/RR-1099 Social Security/Railroad	Dental and vision expenses
Alimony received or paid (need divorce date)	State/local income tax paid
1099-B Sales of stock, mutual funds, residence and other properties	State/local sales taxes paid (on items purchased, cars, etc.)
1099-R Roth IRA contributions, Roth IRA conversions	Real estate property tax
Schedule C (Self-employed) income, expenses, and health ins prems	1098 Residence mortgage interest (also including points, mortgage ins prems)
Schedule E (Rental/Royalty) income/expenses	Personal property taxes (vehicle license tax, etc.)
Education & Other Tax Credits	Charitable cash contributions and mileage
1098-T Tuition fees education exps 1098-E Student loan interest	Non-cash contributions/donations
AZ tax credits (school, charity, foster care) Child and dependent care expenses	Gambling income and losses
529 education contrib/distributions	Misc. tax prep/planning fees, legal fees, etc.
Do you own a business? Provide income, expenses and info below.	
Entity name and address:	
Business establish date:	
Principal activity of your business:	
EIN, phone and website:	
Is your entity a Limited Liability Company (LLC):	
Type of Classification (circle one):	
Schedule C, Schedule F, C-Corporation (Form 1120), S-Corporation (1120-S), Partnership (K-1), Real Estate Rental (Schedule E), Non-Profit	