We realize you have many options when it comes to tax preparation and we are grateful you chose us. Filing the 2021 taxes is looking to be the most challenging year and we are here to help ease the stress. Please take a look at this list as you gather your paperwork for 2021.

***IDENTIFICATION/BANK INFO:***

* Current picture ID
* Proof of social security number (new clients & those getting the debit card)
* Social Security cards for any new dependants
* Routing & Account Numbers for direct deposit (use check not deposit slip)

***INCOME STATEMENTS:***

* W-2’s from each place you were employed in 2021
* W-2 G’s from any gambling winnings
* All 1099’s including (but not limited to)
* (1099 INT/1099 DIV) Interest/Dividends earned from banks and other investments
* (1099-NEC) Self Employment Income

***\*\*Do you have an HSA?***

You will receive a form that states how much money was contributed and how much money was spent. Please look for these forms.

* (1099 Misc) Rental Income, Other Income, **virtual currency**
* **(1099-K) Credit card sales, virtual currency, gig economy**
* (1099-R) Pension, Annuity, Retirement plan distributions
* (1099-G) Unemployment/State Tax Refund
* (1099-B) Broker Statements (ex: sale of stocks, options, **virtual curr**)
* (1099-C) Cancellation of Debt (forgiveness of debt)
* (SSA-1099) Social Security Benefits
* \*\*(1099-SA) HSA Distribution/(5498-SA) HSA Contribution

***CONTRACT LABOR/SELF- EMPLOYMENT INFORMATION:***

* Add all income earned from self- employment or contract labor
* Separate and total all expenses incurred as a result of your self-employment income such as supplies, tools, materials, business vs personal miles driven, car expenses, etc
* **CHECKLIST FOR DAY CARE PROVIDERS AVAILABLE ON OUR WEBSITE**

***ITEMIZED DEDUCTIONS: (BRING IT IN—YOU MAY STILL BE ABLE TO ITEMIZE)***

**CASH** DONATIONS UP TO $300 ($600 MFJ) ARE DEDUCTIBLE WITHOUT HAVING TO ITEMIZE!

* Medical, dental or eye care expenses including ***after-tax*** insurance premiums
* Real Estate Taxes
* Personal Property Taxes (boats, cars, trailers, etc) (MTR VEH TAX on pink slip)
* Sales Tax paid on vehicles, motorcycles, RV’s, planes & boats
* Home Mortgage Interest (Form 1098) from each mortgage if more than one
* Cash charitable contributions (Church, Salvation Army, United Way, etc)
* Non cash charitable contributions (clothing, furniture, etc)

***EDUCATION EXPENSES:***

* (1098-T) Tuition, deductible expenses for education (must have to claim any education credits)
* (1098-E) Student Loan interest (must have to claim student loan interest)

***CHILD CARE EXPENSES: New for 2021-- Increased income limits, deductible amounts & credit ☺***

* Provider name, address, EIN or social security number
* Amount paid for each child

***AFFORDABLE CARE ACT:***

* (1095-A) IF INSURANCE IS FROM THE MARKETPLACE AKA OBAMACARE ***YOU MUST WAIT FOR THIS FORM.***

If there are any questions as to whether you should bring something or not, the best advice is to bring it with you. Associated Tax has been in business of preparing tax return for over 40 years now! We look forward to hearing from you soon. **Please check out our website at** [**www.associatedtaxomaha.com**](http://www.associatedtaxomaha.com)**!**

Important Info for 2021 Taxes

Below are a few things for 2021 (all taxes done in 2022) that we need to make you aware of:

1. **TAX PREPARATION** by Appointment Only at 4800 Dodge St (call either numbers 402-453-9999 or 402-551-1755 to set up appointment time)
2. **OFFICE HOURS & TAX PREPARERS**

Office Hours: Mon-Sat 9-5

Tax Preparers:

**Betty**: Monday-Saturday

**Melissa**: Monday-Tuesday-Wednesday (some Saturdays)

**Page**: Monday-Saturday

**Jim**: Thursday-Friday

1. **4523 N 30th St office is** still closed, all returns will be done at 4800 Dodge St
2. **STIMULUS MONEY & ADVANCED CHILD TAX CREDIT**

* IRS will continue sending out letters that will show how much you received. You will need this information for your tax return. DO NOT THROW THE LETTER AWAY
  + Letter 6419 will show how much Advanced Child Tax Credit you received (NOTE: if you filed Married Jointly in 2020, each spouse that did not opt out should receive a letter—we need both of them)
  + Letter 6475 will show how much the third stimulus was (EIP3)
* The actual amount that you are eligible for is calculated on your 2021 return (some clients may now qualify that may not have before)
* WE HAVE TO KNOW the amount you received from both the THIRD STIMULUS & any ADVANCED CHILD TAX CREDIT payment (if any) prior to completing your 2021 return
* **THE MOST IMPORTANT ISSUE WITH THIS IS** not reporting the correct amount you received WILL DELAY YOUR REFUND BY MONTHS-please do not guess on this amount
* If you did not receive the correct amount of either you will get the rest with your 2021 refund (or it will lesson your balance due).

Thank you! ~ Betty, Melissa, Page & Jim

See Back for What to Bring Checklist