

# **peoples**TAX Tax Appointment Checklist

Whether you choose to file your tax return with us virtually or in one of our RVA tax offices, here is a detailed list of items that will be important when we complete your tax return.

Call (804) 204-1040 today to schedule an appointment or stop by one of our RVA locations.

**The Forum Office Park**  
10120 W. Broad St., Suite C  
Glen Allen, VA 23060  
804-204-1040

**Commonwealth Centre Tax Office**  
4521 Commonwealth Centre Parkway  
Midlothian, VA 23112  
804-763-0667

Try our [Virtual Tax Pro<sup>SM</sup> Service](#) or [Drop-Off Tax Service](#) this year!

Visit [www.peopletax.com](http://www.peopletax.com)

**Please Note: For virtual tax clients, we can accept a scan or image of these items**

## **Personal Information**

- Your driver's license or other federal ID with picture
- Your social security card with your number or tax ID number
- Your spouse's full name and social security number or tax ID number
- Your spouse's driver's license or other federal ID with picture

## **Dependent(s) Information**

- Dates of birth
- Social security numbers or tax ID numbers (cards must be provided if this is your first year with us or if this is a new child)
- Childcare records (including the provider's tax ID number) if applicable
- Income of other adults in your home
- Form 8332 showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent (if applicable)

## **Income Sources**

- **Employed**
  - Forms W-2 or paystub for W-2 download
- **Unemployed**
  - Unemployment income, state tax refund (1099-G)

# **peoples**TAX Tax Appointment Checklist

- **Self-Employed**

- Forms 1099-MISC, Schedules K-1, income records to verify amounts not reported on 1099s
- Records of all expenses — check registers or credit card statements, and receipts
- Business-use asset information (cost, date placed in service, etc.) for depreciation
- Office in home information, if applicable
- Record of estimated tax payments made (Form 1040ES)
- Auto loan or lease if vehicle used for business

- **Rental Income**

- Records of income and expenses
- Rental asset information (cost, date placed in service, etc.) for depreciation
- Record of estimated tax payments made (Form 1040ES)

- **Retirement Income**

- Pension or Retirement income/IRA/annuity income (1099-R)
- Traditional IRA basis (i.e. amounts you contributed to the IRA that were already taxed)
- Social security/RRB income (1099-SSA, RRB-1099)

- **Savings & Investments or Dividends**

- Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
- Income from sales of stock or other property (1099-B, 1099-S)
- Any cryptotax currency transaction information (purchase or redemption)
- Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B)
- Health Savings Account (HSA) and long-term care reimbursements (1099-SA or 1099-LTC)
- Health Savings Account (HSA) or Medical Savings Account (MSA) distributions – 1099-SA
- Expenses related to your investments
- Record of estimated tax payments made (Form 1040ES)

- **Other Income & Losses**

- Lottery or Gambling income/losses (W-2G or records showing income, as well as expense records)
- Jury duty records
- Hobby income and expenses
- Prizes and awards
- Trusts
- Royalty Income 1099 Misc.
- Any other 1099s received
- Record of alimony paid/received with Ex-spouse's name and SSN

# **peoples**TAX Tax Appointment Checklist

## **Deductions**

- **Real Estate/Home Ownership**

- Forms 1098 or other mortgage interest statements
- Real estate and personal property tax records
- Receipts for energy-saving home improvements
- Repayment of the First-Time Homebuyer Credit – Form 5405
- All other 1098 series forms

- **Charitable Donations**

- Cash amounts donated to houses of worship, schools, other charitable organizations
- Records of non-cash charitable donations
- Amounts of miles driven for charitable or medical purposes

- **Medical Expenses**

- Amounts paid for healthcare insurance and to doctors, dentists, hospitals

- **Health Insurance**

- Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange)
- Form 1095-B and/or 1095-C if you had insurance coverage through any other source (i.e. an employer, insurance company, government health plan such as Medicare, Medicaid, CHIP, TRICARE, VA, etc.)
- Marketplace exemption certificate (ECN) if you applied for and received an exemption from the Marketplace (Exchange)

- **Childcare Expenses**

- Fees paid to licensed day care center or family day care for care of infant or preschooler
- Wages paid to a baby-sitter
- Don't include expenses paid through a flexible spending account at work

- **Educational Expenses**

- Forms 1098-T from educational institutions
- Receipts that itemize qualified educational expenses
- Records of any scholarships or fellowships you received
- Form 1098-E if you paid student loan interest

# **peoples**TAX Tax Appointment Checklist

- **Job Expenses & Tax Prep Fees**

- Employment related vehicle expenses (tolls, mileage, gas, maintenance, license, property tax, interest expense, parking)
- Receipts for classroom expenses (for educators in grades K-12)
- Employment-related expenses (dues, education, publications, tools, uniform cost and cleaning, travel)
- Job-hunting expenses
- Record of moving expenses not reimbursed by employer
- Amount paid for preparation of last year's tax return

- **State & Local Taxes or Sales Tax**

- Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
- State refund amount – 1099-G
- Invoice showing amount of vehicle sales tax paid

- **Retirement & Other Savings**

- Form 5498-SA showing HSA contributions
- Form 5498 showing IRA contributions
- All other 5498 series forms (5498-QA, 5498-ESA)

- **Federally Declared Disaster**

- City/county you lived/worked/had property in
- Records to support property losses (appraisal, clean-up costs, etc.)
- Records of rebuilding/repair costs
- Insurance reimbursements/claims to be paid
- FEMA assistance information
- Check FEMA site to see if my county has been declared a federal disaster area

- **Prior Tax Returns**

- Last Year's Federal and State Tax Returns