

2021 CHECKLIST FOR INDIVIDUALS



CLIENT INFORMATION

Taxpayer Name:		Spouse Name:
Taxpayer SSN:		Spouse SSN:
Taxpayer DOB:		Spouse DOB:
Address:		City:
State:	ZIP Code:	Phone #(s):
Email Address(es):		

DEPENDENTS

Name	SSN	DOB	Relationship & Months in Home

ALL CLIENTS: NEW FOR 2021

Did you receive any stimulus payments in 2021? YES NO Amount 1: \$ Amount 2: \$

Did you receive any Advanced Child Tax Credit payments during 2021? YES NO Do you have Letter 6419? YES NO

Did you LIVE or WORK in the City (of Grand Rapids, Walker, East Lansing, Detroit, ETC) during the year? YES NO

If yes, did you also work from home? YES NO If yes, we will need a daily breakdown of work locations.

INCOME AND EXPENSES

SOURCES OF INCOME

<input type="checkbox"/> W-2s	<input type="checkbox"/> 1099-MISCs	<input type="checkbox"/> 1099-DIVs	<input type="checkbox"/> 1099-Rs	<input type="checkbox"/> 1099-Gs (Unemployment, Etc.)
<input type="checkbox"/> W-2Gs	<input type="checkbox"/> 1099-INTs	<input type="checkbox"/> 1099-SSAs	<input type="checkbox"/> 1099-NEC	<input type="checkbox"/> 5498-SA (HSA) <input type="checkbox"/> 1099-SA (HSA)
<input type="checkbox"/> K-1s	<input type="checkbox"/> 1099-B Stock/Property Sales	<input type="checkbox"/> Income from small business/hobby		

EXPENSES & DEDUCTIONS

<input type="checkbox"/> Mortgage Interest (1098)	<input type="checkbox"/> Property Taxes Statements	<input type="checkbox"/> License Registration Fees	<input type="checkbox"/> Charitable Contributions (receipts)
<input type="checkbox"/> Energy-Efficient Improvements	<input type="checkbox"/> Medical Expenses (including Insurance Premiums)	<input type="checkbox"/> Estimated Taxes Paid for 2021	

OTHER FORMS

<input type="checkbox"/> 1095-A, B, or C Health Insurance	<input type="checkbox"/> 1098-T Tuition Expenses	<input type="checkbox"/> 1098-E Student Loan Interest	<input type="checkbox"/> Rental Property Income
<input type="checkbox"/> Copy of Previous Year's Tax Return if VDTA did not prepare		<input type="checkbox"/> Copy of Valid Driver's License or State ID	

REFUNDS AND PAYMENTS

How would you like to receive your refund? Check Direct Deposit Returning Clients, Same banking info as 2020? YES NO

If you owe IRS, State or City taxes, how would you like to pay? Check Direct Debit *Please include any new banking information

THINGS TO NOTE FOR TAX YEAR 2021

- All unemployment, COVID-related or not, is taxable and must be reported on your tax return as income.
- Taxpayers with Earned Income Credit (EIC), Child Tax Credit (CTC) will not begin receiving refunds until mid-February to protect against identity fraud. Direct deposit is almost always the fastest way to receive your refund.
- Medical expenses must exceed 7.5% of your total income to be deductible on 2021 tax returns.
- The standard deduction amount for tax year 2021 is \$12,550 for single filers and \$25,100 for married couples filing jointly.
- ALL taxpayers are eligible for deduct up to \$300 for individuals & \$600 for couples in charitable donations made during 2021.