

Mangold's Tax Service, Inc

Tax Appointment Checklist

Income statements:

W2 _____
Unemployment 1099G _____
Interest 1099Int _____
Dividend 1099DIV _____
Stock Sales 1099B _____
1099Q _____
IRA Distributions 1099R _____
Pensions / Annuities 1099R _____
Social Security SSA Form _____
Gambling/Lottery Winnings W2G _____
Business 1099Misc/1099NEC/1099K _____
Rentals 1099Misc/1099K _____
K-1 from 1041/1065/1120S _____
Award or Bonuses on 1099's _____
Cancellation of Debt 1099C _____
Foreign Income (Virtual Currency) Y/N

Miscellaneous Expenses:

Child Care Form _____
Settlement Sheets from bought and/or sold _____

**VIRTUAL CURRENCY: Y / N Need 1099B or
8949 from Platform**

Market Place or Pennie? Y/N Need 1095A

Estimated Payments Made:

Federal: Dates and Amounts

State: Dates and Amounts

Local: Dates and Amounts

Banking Information if Direct Deposit Required (or provide a voided check)

Checking or Savings

Bank Name: _____

Routing Number: _____

Account Number: _____

Adjustments to Income:

Teachers Educator Expenses _____
Health Savings Account 1099SA _____
IRA/ROTH Contributions _____
Student Loan Interest 1098E _____
Educational Expenses 1098T _____
Educational Distributions

Deductions:

(only if you can exceed the standard deduction)

Medical Expenses _____
(must exceed 7.5% of income)
Mortgage Interest 1098 _____
Real Estate Taxes _____
Charitable Contributions
Cash/Check/Credit Card _____
Non-Cash _____
Gambling Losses (up to winnings) _____

Energy Credit _____
Need Invoice & Certificate if required

Electric Vehicle _____

New Clients

Social Security Numbers, Names, and Birthdates
of all Individuals on the return
Copy of Drivers Licenses/ID for Taxpayers
Copy of Last Year's Return so we can compare and look for:
Loss Carryforwards: From Sched D, E, or QBI
8606 Nondeductible IRA
6252 Installment Agreement
8915F Retirement WD spread over 3 years
5405 First Time Homebuyers Credit
Prior Depreciation - Copy their Prior Year's Worksheet

Signature

Spouse Signature (for Joint Return)

Date: _____