Albertjohn DePalantino and Company PC Going beyond the numbers

Certified Public Accountants and Consultants
19 Short Road, Doylestown, PA 18901 ▪ 215-345-0433 ▪ Fax 215-345-0483 ▪ www.depalantino.com ▪ info@depalantino.com

THINGS TO BRING LIST

If you wish, you may upload these files to your client portal. The best way is through the File Exchange, NOT the Upload link you see on your Home page. In your portal, to the left, click on File Exchange, which is above the folder with your name. To the right of that, click on the To DePalantino & Company folder. Click on the Upload button that will appear above. You can either click on the Add Files button and select your files, or drag and drop them. Click on the Start Upload button.

Please email Kathy Albert at ka@depalantino.com if you need assistance with your client portal.

BE SURE TO BRING ALL OF THE FOLLOWING WITH YOU:

- ☐ Amount of 3rd Stimulus Check received
- ☐ Amounts received for Child Tax Credit
- ☐ ITEMIZED DEDUCTION summary including:
  - ○ Medical deductions and health insurance
  - ○ Local taxes paid, including real estate taxes
  - ○ Mortgage and investment interest paid
  - ○ Charities paid, including donation of money, clothing, vehicles, computer equipment, etc.
  - ○ Employee business deductions **(PA only)**
  - ○ Union dues, uniforms, tools, etc. **(PA only)**
- ☐ Driver's license for Taxpayer and Spouse. This includes children, regardless of age, if they have a driver's license. If your spouse or other family members are not at the appointment, please bring a copy of their driver's licenses. If you do not have a driver's license, we can accept a state issued ID.
- ☐ All copies of W-2s from employers , and K-1 FORMS from partnerships, S Corps, estates and trusts;
- ☐ All year end lender loan statements (forms 1098), including those REFINANCED or paid off during the year;
- ☐ 1099 INT, DIV, and B forms reporting all INTEREST, DIVIDENDS and STOCK SALES for the current tax year;
- ☐ Contributions to IRA's or child's 529 accounts during the tax year;
- ☐ 529 account balances;
- ☐ Crypto Currency transactions;
- ☐ 1099-R forms reporting UNEMPLOYMENT COMPENSATION, STATE TAX REFUNDS, SOCIAL SECURITY BENEFITS, LOTTERY and CASINO WINNINGS;
- ☐ 1099 forms for all PENSIONS, RETIREMENT FUND (IRA or 104(k)) WITHDRAWALS, TRANSFERS and ROLLOVERS;
- ☐ Social security numbers and birth dates of all dependents, including children born during the tax year.
- ☐ A copy of PRIOR YEAR TAX RETURNS for NEW CLIENTS ONLY;
- ☐ Schedule summarizing BUSINESS or RENTAL Income and Expenses, if applicable;
- ☐ Date and amount of each ESTIMATED TAX PAYMENT PAID for the tax year (Federal, State, and Local);
- ☐ Name, address and Federal ID Numbers of all CHILD CARE PROVIDERS;
- ☐ Any IRS or STATE TAX Correspondence;
- ☐ All LOCAL TAX FORMS, if we will file it for you. Please bring in this form;
- ☐ 1098-T From your son's or daughter's college showing tuition billed;
- ☐ Form 1095-A, B, or C showing health insurance coverage; and
- ☐ Logons and passwords for any password protected files you are giving us, including Sage Peachtree, QuickBooks, and Quicken backup files.