M METZGER TAX SERVICE LLC

QUICK CHECK LIST

1. All copies of W-2's, 1099's, and K-1 forms. Also, if you received any **1095(s)** which is information from the Health Insurance Marketplace, we must have copies of these forms.
2. All year-end mortgage loan statements, including those refinanced or paid off and 1098 forms. If you refinanced or got a new mortgage loan, we will need the closing papers.
3. Copy of all closing papers on purchase or sale of home or property.
4. Detailed investment activity reports from your investment brokers. Annual form 1098. Provide ALL pages please.
5. Unemployment compensation (1099-G), and social security benefits (Form 1099-SSA).
6. If you received the $1,400 stimulus payment in 2021, please supply documentation (letter from IRS Notice 1444-C, bank statement, etc.) which shows how much you received. We are required to reconcile your stimulus payment.
7. If you received the Advanced Child Tax Credit funds that began in July and paid monthly, please supply documentation (bank statement, etc.) which shows how much you received. We are required to reconcile these payments.
8. All itemized deduction support. Under a new tax code, even if you do not itemize, but contributed $600 (cash, check, or credit card payments) to a qualified charity, such as your church, you can deduct up to $600 per return as a charitable deduction. Remember too that we still need all itemized details for your State return(s). Itemized deductions include property tax statement, City of Portland art tax, mortgage interest 1098 forms, out of pocket medical costs, and proof of contributions.
9. If you were involved with any form of cryptocurrency, please provide a detail of EACH transaction.
10. Schedule summarizing business or rental income and expenses (by property).
11. Payment record of estimated tax payments paid for the year including date and amount.
12. Child Care: Name, address, social security or Tax I.D. and amount paid to each provider.
13. Any IRS or State correspondence you may have received during the year.
14. College breakdown: Payment schedule for tuition, fees, books and supplies, and form 1099-T.
15. If you changed bank accounts and expect a refund, please enclose a current voided check.
16. If we do not already have on file, we are required by the IRS to make copies of government issued ID for individuals listed on the tax return and maintain it in our files. This is for your fraud protection. For any dependent listed on your return, we must have a copy of their birth certificate AND Social Security card.
17. If you were a past client and would like a **detailed organizer** listing your specific areas of taxation, please e-mail margaret@metzgertax.com.
18. New clients – Welcome. We will need your prior 2 years tax returns, if not previously supplied.

Call for a drop off appointment
Or use our convenient secured web portal
(503) 246-4776