

## L & V BOOKKEEPING, LLC

2647 Clime Rd, Columbus, OH 43223 Phone (614) 214-2357 Fax (614) 443-2059

PO Box 1204, Grove City, OH 43123

Email: [lvbook.tax@gmail.com](mailto:lvbook.tax@gmail.com)

### Tax Appointment Checklist

- **Personal information -**
  - Last 2 years income tax if you are a new client
  - Name, address, Social Security number and Date of Birth for yourself, spouse and dependents. Copy of birth certificates and Social Security cards for new clients and their dependents.
  - Dependent Provider, Name, Address, Tax ID and S.S.N.
  - Banking information if Direct Deposit Required
  - Copy of current Driver's License or State ID.
  
- **Income Data Required -**
  - Wages and/or Unemployment
  - Interest and/or Dividend Income
  - State/Local income tax refunded
  - Social Assistance Income
  - Pension/Annuity/Stock or Bond Sales
  - Contract/Partnership/Trust/Estate Income
  - Gambling/Lottery Winnings and Losses/Prizes/Bonus
  - Rental Income
  - Self Employment/Tips
  - Foreign Income

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### 1. New for 2021 include your letters from IRS

- **Letter 6419** - This letter gives figures for the Advance Child Tax Credit.
- **Letter 6475** – This letter contains the Total amount of the 3<sup>rd</sup> Economic Impact Payments and any Plus-up Payments received in 2021.

### ○ **Expense Data Required -**

- Dependent Care Costs
- Education/Tuition Costs/Materials Purchased Include 1098T and Bursar statements for each institution and each student.
- Medical/Dental
- Mortgage/Home Equity Loan Interest/Mortgage Insurance
- Gambling/Lottery Expenses
- Investment Expenses
- Real Estate Taxes
- Estimated Tax Payments to Federal and State Government and Dates Paid
- Home Property Taxes
- Charitable Contributions Cash/Non-Cash
- Purchase qualifying for Residential Energy Credit
- IRA Contributions/Retirement Contributions
- Home Purchase/Moving Expenses

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