



CSL Tax Advisors Appointment Checklist

Taxpayer: _____

Spouse: _____

Please inform your preparer of changes to marital status, contact information, or dependents.

IDENTIFICATION

- ☐ Copy of Taxpayer's Driver's License
- ☐ Copy of Spouse's Driver's License
- ☐ IRS PIN (issued by IRS after Identity Theft)

INCOME

- ☐ Virtual Currency (Ex. Cryptocurrency)
- ☐ Foreign Bank or Financial Accounts
- ☐ Third Economic Stimulus Received
- ☐ Advance Child Tax Credit Received
- ☐ Form W-2 Wage Income
- ☐ Form 1099-DIV Dividend Income
- ☐ Form 1099-INT Interest Income
- ☐ Form 1099G State Tax Refund (if Itemized 2020)
- ☐ Form 1099G Unemployment Benefits
- ☐ Form 1099-NEC Self-Employment
- ☐ Alimony Paid or Received
- ☐ Gifts of \$15,000 or more paid
- ☐ Form 1099(R) Retirement Income - IRA, Pension, Annuity, Insurance payments
- ☐ Form SSA-1099 Social Security Benefits
- ☐ Form 1099(B) Brokerage Income
- ☐ Cost Basis for Investments Sold
- ☐ Form W-2G Gambling Winnings
- ☐ Form-C Canceled Debt
- ☐ Rental Income (see Rental Organizer)
- ☐ K-1 Forms from Partnerships, 1120S Corporations, Trusts, & Estates

EDUCATION

- ☐ Student Loan Interest
- ☐ Teacher classroom expenses (K to 12th)
- ☐ Form 1098-T for College Tuition
- ☐ Receipts for books
- ☐ Form 1099-Q 529 Plan Distributions

OTHER CREDITS & DEDUCTIONS

- ☐ Charity paid by check or credit card
- ☐ Estimated Payments – Fed and/or State
- ☐ Child Care Expenses - Need provider's name, address, and tax ID number
- ☐ IRA Contributions – Traditional, Roth
- ☐ Form 5498-SA HSA Contributions
- ☐ Form 1099-SA HSA Distributions
- ☐ Form 1095A - Marketplace Healthcare Insurance

MISSOURI DEDUCTIONS

- ☐ Medical Ins. – Out of pocket premium expenses for Supplemental, Health, Prescriptions, Dental
- ☐ Long-Term Care Insurance Premiums
- ☐ 529 College Saving Plan Contributions
- ☐ Missouri Tax Credits – need certification form

ITEMIZED DEDUCTIONS

- ☐ Medical Expenses over 7.5% AGI
Co-pays, Deductible, Doctor, Dentist, Glasses
- ☐ Personal Property Tax Paid
- ☐ Real Estate Tax Paid
- ☐ Sales tax – Cars, Boats, Motorcycles, RV
- ☐ Form 1098 - Mortgage Interest & PMI
- ☐ Charity paid by check or credit card
- ☐ Noncash Charity – use thrift store value
- ☐ Home Sale/Purchase/Refinance
Bring Settlement Statements
- ☐ Gambling Losses – allowed to extent of winnings

DIRECT DEPOSIT

- ☐ Bank Name, Routing & Account Numbers

