



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
- Economic stimulus amounts received
- Form W-2 Wage Income
- Form 1099-DIV Dividend Income
- Form 1099-INT Interest Income
- Form 1099G State Tax Refund
- Form 1099G Unemployment Benefits
- Form 1099-MISC Self-Employment
- Alimony Paid or Received
- Gifts of \$15,000 or more paid
- Form 1099(R) Retirement Income - IRA, Pension, Annuity, Insurance payments
- Form 1099-SSA Social Security Benefits
- Form 1099(B) Brokerage Income
- Cost Basis for Investments Sold
- Form W-2G Gambling Winnings
- Form-C Canceled Debt
- Rental Real Estate Property
- 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
- 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

