

CHECKLIST & CHANGE FORM*(Please return this with your tax documents each year)*

1. Name(s) _____

2. Best Phone # to contact you _____

3. Best e-mail address: _____

4. **Ohio Use Tax Reporting:** If during 2020 you made any out of state purchase of goods or services that you used, stored or consumed in Ohio (e.g. internet, catalog) and if you paid NO sales tax in any state on that purchase, you are required to pay Use Tax. Please let us know if this is the case and we can calculate the tax to be paid.

IF YOU HAVE ANY TO REPORT CHECK THE BOX

5. **Please list below any changes to your personal information:** additional dependents, change of address, or any other changes such as : purchase or sale of a business, purchase, sale or refinance a home or rental properties.

6. Please make sure you have included the following documents as applicable:

INCOME STATEMENTS:

- _____ Forms for wages (W-2)
- _____ Interest and dividend statements (1099-INT, 1099-DIV)
- _____ Social Security income statements (SSA-1099)
- _____ Pension and IRA income Statements (1099-R, 1099-MISC)
- _____ Brokerage statements for sale of stocks, bonds, funds. *You must provide purchase date, original price and sales price, if your broker has not already done so.*
- _____ Unemployment compensation (Form 1099-G)
- _____ Gambling income (Form W2-G)
- _____ Pass through entity forms (Schedule K-1)
- _____ Income/Expenses for self employed business income
- _____ Withdrawals from 529 College Advantage Plans (Form 1099-Q)

PROPERTY STATEMENTS (home, vacation home, rentals):

- _____ Statements for mortgage interest and/or lines of credit
- _____ Real estate taxes
- _____ Closing statements for sale/purchase/refinance
- _____ Income/Expenses for rental properties

DEDUCTIONS/CREDITS/OTHER:

- _____ Student loan interest statements
- _____ Tuition and fees statements (we MUST have the 1098-T statement from college(s))
- _____ List of charitable contributions; both cash and non-cash (keep the receipts for your records)
- NEW** please note: \$300 above the line charitable deduction allowed even if you don't itemize **NEW**
- _____ Dates and amounts of estimated payments to IRS, State of Ohio, School District and City, as applicable
- _____ Any tax notices sent to you by the IRS or any other taxing authorities
- _____ HSA Contributions/Distributions
- _____ IRA Contributions/Distributions: Roth, Regular, Non-Deductible, Rollovers
- _____ Contributions to 529 College Advantage Plans
- _____ Medical/Insurance Deductions
- _____ Educator Expenses (up to \$250)
- _____ 1095 Forms A, B, C , as applicable (Health Insurance Coverage Forms) ****
- _____ Residential energy improvements to primary residence

**** Please note: Health insurance verification is no longer required. However, if you received Premium tax credits, or think you should have, please provide us with Form 1095 so we can see if you qualify.