



MacFarlane and Associates, P.C.

Certified Public Accountants

Personal Information:

- Prior year tax return (new clients)
- Photocopy of driver's license (both spouse and taxpayer)
- Does the taxpayer and/or spouse have an **IRS Identity Protection PIN**? If so, we need the IRS letter(s).
- Are there any changes in address, marital status or dependents from prior year
- Any changes in types of income from prior year, for example, opened or closed a business, purchased or sold a rental house, etc. Provide information if you moved or sold your home or other property.
- Information for Health Savings Accounts (HSA), Long term Care plans and Health insurance if you receive a 1095-A form. This is if you are on the exchange (Healthcare.gov) insurance plan.
- Stimulus payments received (Cares Act)
- At any time during 2020, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any **Virtual Currency** (for example, **Bitcoin**)?

Income - Include all 1099 and W-2 statements including the following (if applicable):

W-2 - Earnings from your job	W-2 G - Gambling winnings (also include Win/Loss statements from the Casinos)
1099-INT - Interest income	1099-B - Proceeds from Broker transactions
1099-DIV - Dividend income	1099-G - Government payments (including unemployment compensation)
1099-C - Cancellation of debt	1099-MISC - Miscellaneous income
1099-NEC - Non-Employee Compensation	RRB-1099 - Railroad Benefits income
SSA 1099 - Social Security Income	1099-R - Distributions from retirement accounts
1099-S - Proceeds from Real Estate transactions	K-1 - Partnerships, Trusts, S Corporations

Itemized deductions Tax payment receipts, charitable contributions, medical expenses, mortgage interest statement (Form 1098) – Note that we will only use this information if it over your standard deduction

Rental properties – see Rental and Royalty Income Schedule

Business (Sole Proprietorship) – Schedule C Schedule

Student Loan or Other Educational Information:

- **Form 1098-E** Student Loan Information
- **Form 1098-T** Education Payments from University or School and include any other deductible expense such as books, etc.