



1620 Elton Road, Suite 204
Silver Spring, MD 20903
Tel: 301-589-2040 / Fax: 301-589-2042
Email: integratedmultiservices@gmail.com
Website: www.integratedmultiservices.com

IT'S 2022 TAX SEASON!!!!!!

What you need to file your taxes varies depending on your situation. Below is a helpful checklist of the tax documents and forms you will need to bring to properly prepare your 2021 tax return.

REQUIRED - WHAT TO BRING

- ALL TAXPAYERS:** An unexpired government issued photo ID, driver's license or passport and social security card or Tax ID (ITIN Letter).
- FOR ALL DEPENDENTS:** Date of birth (birth certificate for minors), social security card or tax ID (ITIN Letter).
Required for Minors: Proof that minor has been living with you such as a school report card, official school letter, doctor letter, court custody document, rental lease.
- HEALTH INSURANCE:** Form 1095-A, if you are enrolled in an insurance plan through Marketplace (Exchange).
- CHILD TAX CREDIT:** IRS Letter 6419, if you received any advance payments for the Child Tax Credit in 2021.
- 2021 STIMULUS PAYMENT:** IRS Notice 1444-C, if you received stimulus payment.
- ALL INCOME STATEMENTS:** Form W-2 (earnings and withholdings), Form 1099-G (unemployment), 1099-MISC or 1099-NEC (self-employment), Form W2-G (gambling winnings) **including** loss report, Form 1099-R (pension/retirement), Form 1099-DIV (dividends), Form 1099-INT (interest), Form SSA-1099 (social security benefits), Form 1099-B (stock sales), Form 1099-SA (health savings account), transactions involving cryptocurrency (virtual currency), and any other document(s) showing income. Income of dependents and/or spouse in your home.
- SELF-EMPLOYED OR IF YOU OWN A BUSINESS:** Form 1099-MISC or 1099-NEC, Schedule K-1, business income records to verify amounts not reported on 1099-MISC or 1099-NEC, business registration documents.
Expenses: Records or reports of all expenses including bank and/or credit card statements, receipts, records of checks written and mileage log record. Business use asset/equipment information (cost, date placed in service, etc.).
Home Office: Square feet of home and area used for business. Record of home-related expenses like utilities and mortgage (or rent).
Tax Payments: Records of estimated tax payments made in 2021.
Rental Income: Records of income and expenses paid. Rental asset information (cost, date placed in service, etc.).
- COLLEGE STUDENTS:** Tuition Form 1098-T **including** proof of payments and expenses such as supplies, and equipment paid. Form 1098-E, if you paid student loan interest.
- EDUCATOR EXPENSE:** Receipts for classroom expenses or supplies purchased (for educators in grades K-12).
- IF ITEMIZING DEDUCTIONS:** Provide expense records such as Form 1098 (mortgage interest form), real estate and personal property tax payments, receipts for unreimbursed medical or insurance expenses, charitable contribution receipts (church/organization letter or donation document), last year's state refund amount.
- CHILDCARE EXPENSE:** Document from childcare provider **including** business name, address, social security/ITIN or EIN number, and amount paid for year.
- FOR DIRECT DEPOSIT OR PAY TAX BALANCE DUE:** Voided Check or Account Information with bank routing, account number and type of account to confirm.
- IDENTITY PROTECTION PIN:** IRS Letter CP01A, if issued to you, your spouse, or your dependents.
- FOR NEW CLIENTS:** Bring your prior year tax return (mandatory).

*****WE ARE HERE TO HELP YOU DETERMINE WHAT DOCUMENTS YOU NEED TO FILE YOUR TAXES. PLEASE FEEL FREE TO CALL US FOR A FREE CONSULTATION*****