

QWEST FINANCIAL — SERVICES, INC. —

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Tax Return Checklist

- A copy of your 2021 tax returns
(If we prepared your 2021 returns we have them on file)
- Name, Social Security number and date of birth for taxpayer, spouse and all dependents
- Bank routing & account numbers for direct deposit
- All 2022 W-2 Forms
- Health Insurance
 - Form 1095-A (for health insurance through Market Place)
- All 1099 Forms including but not limited to:
 - 1099-Misc (self-employment income statements)
 - 1099-INT (interest income)
 - 1099-DIV (dividends earned)
 - 1099-B (stock and securities sales)
 - 1099-G (other compensation)
 - 1099-R (pension and Annuity income)
 - 1099-S (proceeds from real-estate transactions)
 - 1099-SA (distributions from medical savings accounts)
 - SS-1099 (from social security income)
- All 1098 Forms including but not limited to:
 - 1098 Mortgage Interest Statement
 - 1098-E (Student Loan Interest)
 - 1098-T (Tuition Statement)
- Any virtual currency transactions for 2022 (Cryptocurrency, NFTS)
- Real Estate Property Taxes paid
- Settlement Statements for property bought or sold in 2022.
- For renters: Address of residence, name and address of landlord, amount of rent paid in 2022, and # of months rented
- Personal Property Taxes paid (found on vehicle registrations)
- Amounts and dates of Quarterly Estimated Tax Payments for 2022.
- Charitable contribution receipts, statements and mileage
- Medical Expenses, including mileage
- Dependent care (daycare) expenses (include amount paid, providers name, and SS or EIN #)
- Schedule K-1's from Partnership, S-corporation, or Trust
- Income and expenses from businesses you own including business mileage
- Rent income and expenses for all units owned during 2022
- Any additional forms that say "Important Tax Document"