

**Kelly Oakes, CPA LLC**  
**Accounting, Payroll, and Tax Services**  
6562 Glenway Avenue  
Cincinnati, Ohio 45211  
(513) 598-6500

**What to Bring or Send for 2022 Tax Preparation**

- Charitable Contributions
- All W-2s (and recent pay stubs if needed to adjust withholding)
- Social Security Statements
- Interest and Dividend Statements
- IRA & Pension Statements (for withdrawals)
- "Miscellaneous income" statements and bitcoin records, if any
- Abandonment of Property & Cancellation of Debt
  
- Amounts of any (Roth or traditional) IRA contributions you made for the tax year
- Sales of Stocks & Bonds
- Brokerage Statements: MUST have COST of Stocks/Bonds sold & date acquired
- Statement of Student Loan Interest
- Tuition Statement from college accounting office  
PLUS Receipts for book & technology purchases for college
- Property Taxes paid on your home (IN/KY residents also vehicle registration taxes)
- Sales tax paid on vehicles, motorcycles, boats, RVs
- Mortgage Interest Statements
- Health Savings Account Statements and direct contributions you made
- Copy of Closing Statement (HUD-1) if Bought/Sold Home or other property - Need Closing Stmt for both Old Home and New Home
- Medical expenses, including after-tax insurance premiums, doctor, dental, vision care, hospital, & pharmacy bills, medical mileage log
- K-1 forms for Partnerships, S-Corporations, Trusts or Estates
- Receipts for cash charitable contributions over \$250, & a list of organizations & amounts
- Receipts and manufacturer information on energy credit purchases for your home
- Receipts & itemization for non-cash charitable contributions (call for Worksheet) or Form 1098-C
- Rent income & expenses for rental property (call for a worksheet)
- Information on any foreign bank or financial accounts (including high and average balances for the year) including statements
- Child care amounts paid for each child with provider name, tax ID, and address
- Contributions to state tuition programs (529 Plans), Ohio state political contributions
- Any correspondence received from taxing authorities that I haven't already seen
- Copies of any other Statements you think might be relevant including 1099-LTC, 1099-H

**SSA-1099**

**Form 1099-INT\*, 1099-OID, 1099-DIV\***

**Form 1099-R**

**Forms 1099-NEC, -MISC, -K, -S\*, -B\*, -G, etc.**

**Form 1099-A & 1099-C**

**Form 5498\* if available**

**Form 1099-B**

**Form 1098-E**

**Form 1098-T, Form 1099-Q**

**Form 1098**

**Form 1099-SA, 5498-SA**

**Form K-1**

**Form 1098-C**

If you expect to qualify for the Earned Income Credit, you will need to bring household income and expense information, Social Security Cards, and proof of residence for each child claimed.

All forms in **bold type** are forms the IRS has and will check against your return

Please call if you have questions about acceptable documents.

**\*May not be due out until 02/15/2022 or later**

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**What to Bring or Send for 2021 Tax Preparation**

**If Self Employed or in a small "side" business:**

Books and records of business

Total Sales or Receipts and Forms 1099-NEC\*, 1099-MISC\* and 1099-K\* received

Expenses—list by categories which may include:

- Advertising, Insurance, Business Interest, Office Supplies, Rent, Repairs, Supplies
- Business Meal records
- Taxes, Meals when out of town overnight, Motel, Airfare, other Travel expenses
- Salaries paid employees (W-2 Wages), Subcontractor payments including copies of 1099-NEC filed
- Purchases for resale, Ending Inventory (which will be deductible as sold, probably in the next year)
- Car and Truck Expense— mileage logs and total mileage (Need BOTH business miles and non-business miles whether you deduct actual expenses or take the standard mileage allowance), starting and ending mileage for the year; records of actual expenses **AND MILEAGE LOGS**
- Cost & date of Purchase for any new equipment, computers, machines, etc.
- Health Insurance if not covered by a subsidized plan offered by your employer or your spouse's employer
- Payroll records for employment and health insurance credits

**Home office for your business:**

If you qualify to take this deduction, please supply:

- Square footage of office and total for home (only if this is a new deduction for you or you moved in 2021)
- COST of home and date you began using it as a home office (only if this a new deduction for you or you moved in 2021)
- Annual expenses for homeowner's insurance, utilities and repairs on your home

**No Mileage deduction will be allowed without mileage logs**

Please call if you have questions about acceptable documents.

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