

What to Bring



tax year 2021 www.hupptax.com

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Please Bring:

Name: _____

- Anything marked "Important Tax Document"
- W2s, 1099s, etc. (showing income)
- 1098s & 1099s (showing deductions, payments, etc.)
- 1098-T for students. (REQUIRED for education credits)
- 1095-A (Marketplace health insurance)
- Prior year tax return (if not prepared by Hupp Tax)

Changes during 2021:

Moved (when?) _____

Moved (where?) _____

Did you get (circle) : Married/Divorced/Separated?

If so, when? _____

New Dependent? Include name, relation, DOB & SSN

- Advance Child Tax Credit amount** - Please include IRS letter 6419, mailed January 2022.
- 3rd Stimulus amount** - EIP3 (payments started March '21, remember the \$1,400 each?) \$ _____

Some Key Changes for tax year 2021

- Child & Dependent Care credit increased substantially. Make sure you include your day care info!
- Charitable (monetary) donations up to \$300 (now \$600 MFJ!) deductible, regardless of "itemizing"
- Business meals at a restaurant are 100% deductible in 2021 and 2022 (was 50%)
- Energy Credit extended again for 2021 for some windows, doors, insulation, furnace, etc.
- Child Tax Credit - higher amount in 2021 as well as the "advance" feature.
The advance must be reconciled on tax return and paid back if you received too much.

- Quarterly Estimates** (please specify if any amounts below were applied from prior year)

	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total
Federal payments					\$
Ohio payments					\$
City (RITA, CCA, Geneva, etc)					\$

- Self-Employed** - summarize income & expenses (see enclosed worksheet or hupptax.com)
- Rental Property** - summarize income & expenses (see enclosed worksheet or hupptax.com)

Common Tax Breaks - (continued on back)

<input type="checkbox"/> College Tuition - The student's 1098-T is REQUIRED.	
Other required educational fees, BOOKS	\$
<input type="checkbox"/> New Ohio credits for 2021:	(see list of qualifying NCNP schools at hupptax.com/resources)
Nonchartered/nonpublic (NCNP) tuition paid (excludes most Catholic schools)	\$
Homeschool expenses (books, supplies, software only, NO electronics or PCs)	\$

Common Tax Breaks (continued)

Health Savings Accounts (HSA) - Please include the 1099-SA.

Amount contributed (max. \$3,550 Single, \$7,100 Family, add'l \$1,000 catch up if over 55)	\$
Was any HSA distribution NOT used for qualified medical expenses?	non-medical amount \$

IRA contributions - max. \$6,000 (\$7,000 if > 50)

	Owner	Amount	Owner	Amount
Traditional		\$		\$
Roth		\$		\$

Child & Dependent Care Credit - Expenses paid for day care in order to work or attend school

Provider Tax ID, Name & address:	
Amount spent per child: child name _____	Amount \$ _____

Medical Expenses - Total expense must be over 7.5% of AGI before any deduction.

****If medical exceeds 7.5%, it can help on the Ohio return, even if it doesn't on the Federal return.*

Health Ins. premiums (not through payroll)	\$		
Prescriptions	\$		
Dentists, Doctors	\$		
Hospitals, Labs	\$	Other	\$
Long Term Care Insurance	\$	Other	\$
Eyecare: Contacts, glasses	\$	Miles driven for medical	\$

Itemized Deductions - Itemizing will help if deductions are more than your standard deduction.

Standard deduction amounts: Single \$12,550, Married \$25,100, Head of Household \$18,800

- additional standard deduction of \$1,700 (single) or \$1,350 (MFJ, HOH) if 65+ years and/or blind.

Mortgage Interest & Property Taxes

Please note amount paid (unless already included on form 1098.)	Interest	Property Taxes
	\$	\$

Charitable donations - IRS requires receipts for ALL donations

Cash/Check Donations

Church	\$
Other	\$
Other	\$

Non-Cash Donations *

Goodwill	\$
Purple Heart	\$
Other	\$

* If over \$500, additional detail required; itemized list, value, etc

Gambling losses (not to exceed gambling winnings) \$