


TITLE:			 A&Z Tax and Financial Solutions A&Z Management System			
TAX RETURN REQUIREMENTS						
BUSINESS UNIT: A&Z Tax and Financial Solutions	REGION: El Paso TX	FUNTION: TAX	DOCUMENT NUMBER: CL-TX-A&Z-002			
PROCESS OWN: Service advisor	APPROVED BY: Glendis Zabala CEO Manager	REVIEWED BY: Cesar Alesi Dev. Manager	DATE REV: 25- Jan- 2021	REV. # E	SECTION: 001	PAGE: 1 - 2

Being organized at tax time can save you time and money.
Use our tax checklist below to help determine what information you will need to submit.

You / Spouse / Dependents (Basic Info) +

- Name, SSN or ITIN, date of birth of the taxpayer, spouse and dependents
- Last Year's Return (Opcional),
- Estimated Taxes Paid (Opcional),
- ID or DL.
- Dependents' birth certificate.

You / Spouse / Dependents (Documents Received) +*

- Forms W-2 - wage and tax returns
- Forms 1099-NEC Non-employee compensation or 1099-MISC Miscellaneous Income (SELFT-EMPLOYMENT) and others *
- Unemployment compensation (1099-G) *
- Form 1095 - Proof of Health Insurance (1095-A)
- Economic Impact Payment Letter (IRS) Notices 1444-A, 1444-B y 1444-C.
- 6419 IRS Letter (total amount of advance payments received from the child tax credit).
 - Form 1098 - includes mortgage interest (1098)
 - Student Loan Interest (1098-E)
 - Forms 1099 - includes dividend income (1099-DIV or interest income (1099-INT and 1099-OID),
 - Merchant card and third party network payments (1099-K),
 - Retirement plan distribution (1099-R),
 - Sale of house or real estate (1099-S),
 - Forms 2439 - Notice to shareholder of undistributed long-term capital gains,
 - K-1 - Partnership, S Corporation and trust income.

You / Spouse / Dependents (Personal Records) *


- Child and Dependent Care Expenses (Daycare),
- Education Expenses (College),

* IF APPLY

+ THOSE THAT APPLY

REQUIRED

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- Medical Expenses (Not Covered by your health insurance),
- Vehicle (personal property) Taxes paid (Vehicle registration).

You / Spouse / Dependents (Real Estate Tax) *

- Mortgage Interest Paid
- Charitable Contributions
- Business or Employee Expenses
- Gambling Expenses
- Investment Transactions
- Retirement Contributions
- Foreign Earned Income and Foreign Taxes Paid
- Energy Efficiency Property Expenses
- Household Employee Expenses
- Alimony Expenses and/or Income
- Expenses for miscellaneous itemized deductions

You / Spouse / Dependents (E-file/Print)

- Bank Information (Account and Routing Number for Direct Deposit/Withdrawal)
- Prior year's Self-Select PIN or Prior year's AGI (Adjusted Gross Income)

* IF APPLY

+ THOSE THAT APPLY

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