



FCDC 2021 Drop Off Form

Are you a returning Peoples Tax Client? Y | N
 Do you have your PRIOR YEAR'S RETURN? Y | N

Client Information:

Marital Status:

Single | Married | Widowed

Primary Taxpayer Name: _____ Spouse Name _____

Date of Birth: _____ Spouse Date of Birth: _____

SSN or ITIN: _____ Spouse SSN or ITIN _____

Occupation: _____ Occupation _____

Physical Address: _____ Physical Address (if different): _____

City, State, Zip: _____

Preferred Contact Method: Email | Phone

Best Phone Number: _____ Best Phone Number: _____

Email: _____ Email: _____

Driver's License #: _____ Driver's License #: _____

Date Issued: _____ State Issued: _____ Date Expired: _____ Date Issued: _____ State Issued: _____ Date Expired: _____

Dependents *(or person living in your household)*

Name	Relationship	Date of Birth	SSN or ITIN <i>(new clients only)</i>	Full-time Student?	Disabled?

Did all dependents live with the primary taxpayer all year? Yes | No

2021 Tax Filing Checklist/Resource Sites/ FYI's

Tax Checklist - W-2 Employees:

If you're a W-2 employee your employer must provide you a W-2 statement by February 1, 2022.

[Forms W-2](#) from your employer(s)

Forms 1099 from banks, issuing agencies, and other payers including [unemployment compensation](#), [dividends](#), distributions from a [pension, annuity, or retirement plan](#)

[Form 1099-K](#), [1099-MISC](#), W-2, or other income statements if you worked in the [gig economy](#)

[Form 1099-INT](#) if you were paid [interest](#)

Other income me documents and records of [virtual currency](#) transactions

Form 1095-A, Health Insurance Marketplace Statement, to [reconcile](#) advance Premium Tax Credits for Marketplace coverage

Letter 6419, 2021 Total Advance Child Tax Credit Payments to [reconcile](#) your advance Child Tax Credit payments

Letter 6475, Your 2021 Economic Impact Payment, to determine whether you're eligible to [claim](#) the Recovery Rebate Credit

Tax Checklist for 1099 Employees:

Freelancers, contractors, and those who are self-employed.

Tax document checklist for self-employed:

[Form 1040](#): This is the basic form used by nearly everyone reporting an income, whether they're self-employed or not. Some variations of this form exist, like the 1040-SR for seniors.

[Schedule C](#): This is the reporting form you submit in addition to your Form 1040 as a sole-proprietor. That includes anyone who works for themselves or as an independent contractor.

Economic Impact Payment notice: If you received a payment from the IRS as part of the CARES Act, you'd need to claim it as income on your taxes. The IRS sent out paper notices, even if your payment was direct-deposited.

Unemployed in 2021:

Income tax preparation checklist for unemployment:

[Form 1040](#): Even if you didn't have a job in 2021, you still need to file your taxes. Unemployment payments are considered "taxable income" by the IRS.

W-2 statements: If you were employed in the early part of 2021 but had to stop working, don't forget to count your income from that job.

[Form 1099-G](#): if you received unemployment this year, you should obtain a Form 1099-G from your local unemployment office.

Economic Impact Payment notice: If you couldn't work this year, the IRS economic impact payments probably helped a little. Check your [payment status](#) with the IRS if you don't remember getting yours.

Deductions: You may be able to deduct job search expenses like travel, resume preparation, and postage. Collect your receipts to claim deductions for these expenses. It's a good idea to digitize them too.

Investments: Just because you missed out on income this year doesn't mean your investments aren't earning dividends. Check with your broker to get the right forms to report them.

The [Economic Impact Payments](#) released earlier in 2021 need to be included in your tax prep checklist