BOELMAN SHAW
TAX AND FINANCIAL PLANNING

Name

Address

Phone

Email

Our Process

1. Drop Off / Upload Materials
2. Prepare Return
3. Review & Finalize
4. Sign

Returning clients do NOT need to provide 2019's tax return.

My Appointment

Please drop off or upload your documents by the date below.

Drop off date

If you choose to drop off your tax documents rather than upload, please place your tax documents in this envelope and return to Boelman Shaw. The checklist below is provided for you as a guide. Please also reference our website at www.boelmanshaw.com. Click on "Resources," 2020 Tax Worksheet, for a more extensive organizer.

Income

- ❑ Received $1200 COVID stimulus check
- ❑ W-2
- ❑ 1099 Interest
- ❑ 1099 Dividends
- ❑ 1099 Social Security Income
- ❑ 1099 Pension/Annuity Disbursement
- ❑ 1099-R IRA Withdraw/Rollover
- ❑ 1099-R IRA Distribution/Rollover
- ❑ All IRA Year-End Statements
- ❑ 1099 Unemployment Income
- ❑ 1099 State Tax Refund
- ❑ 1099 Broker Statement
- ❑ W2G Gambling Income
- ❑ Stock Sales - Purchase and info
- ❑ Rents
- ❑ Agricultural Payments
- ❑ Home Purchase/Sale Documents (HUD)
- ❑ K-1's from S-Corps, Partnerships, Estates, Trusts
- ❑ Alimony Received
- ❑ Other

Business

- ❑ Furnish Income & Expense detail separately
- ❑ Business Mileage/Expenses

Deductions

- ❑ 1098 Mortgage Interest
- ❑ Property Taxes Paid (primary/secondary residents)
- ❑ Prescription drugs (no "over-the-counter" drugs)
- ❑ Doctors/Dentists/Hospitals/Glasses/ Medical Miles driven
- ❑ Medical insurance premiums (paid out of pocket)
- ❑ Long term Health Care insurance premiums
- ❑ 1095-A ACA Health Insurance
- ❑ Auto License Fee (list make/model/fee paid)
- ❑ Estimated taxes paid (date/amount for Federal/State)
- ❑ Childcare: Name, Address, Social Security or EIN# of provider
- ❑ Amount paid to daycare provider
- ❑ Charitable Contributions (organization/$ donated)
- ❑ Value of good donated (usually fair market value)
- ❑ 1098 Student Loan Interest
- ❑ 1099-T College Tuition Statement
- ❑ IRA Contributions (ROTH/Traditional)
- ❑ Alimony Paid
- ❑ Other

Notes for your preparer:

I would like more information on these financial planning topics:

Retirement Planning
- ❑ Retirement goals
- ❑ Retirement savings strategies
- ❑ Retirement income strategies
- ❑ Social Security and Medicare

Financial Planning & Investments
- ❑ Traditional or Roth IRAs
- ❑ Asset allocation strategies
- ❑ Second opinion on investment strategy
- ❑ Personal risk assessment

Estate Planning
- ❑ Wills and Trusts
- ❑ Tax-efficient transfers
- ❑ Charitable gift strategies
- ❑ Beneficiary designations

Education Planning
- ❑ Estimate future cost of education
- ❑ College savings strategies
- ❑ State 529 plans

Tax Planning
- ❑ Tax-efficient investments
- ❑ Bracket management
- ❑ Roth conversion
- ❑ RMD planning

Risk Management
- ❑ Life insurance policy review
- ❑ Insurance needs analysis
- ❑ Using life insurance in estate planning

Other: