

Tax Preparation **CHECKLIST**

This checklist will help you gather your important personal, and financial information. This will help avoid multiple trips and errors with your tax professional.

Employment & Income Date

- W-2 Forms for this tax year
- Unemployment compensation: Forms 1099-G
- Miscellaneous income: Forms 1099-MISC
- Partnership, S Corporation, & Trust income: Schedules K-1
- Pensions, Annuities, or IRA distributions including rollover/conversions: Forms 1099-R
- IRA (Traditional, Roth, or Educational), SEP, and KEOGH contributions
- Social Security/RR1 benefits: Forms RRB-1099
- Alimony Received
- Jury Duty Pay
- Gambling and Lottery winnings
- Prizes and awards
- State and local income tax refunds: Form 1099-G
- Federal tax refunds or advance payments received
- Rental Property Income & Expenses (for new rentals bring Form HUD-1 on sale/purchase and tax assessment.)

Homeowner/Renter Data

- Mortgage Interest: Form 1098
- Sale of your home or other real estate: Form 1099-S
- Second mortgage interest paid
- Real estate taxes paid
- Moving expenses – (qualifying distance: 50 miles or more)
- Purchase of home or real estate: Form HUD-1 “Settlement Statement”
- Home Improvement Expense – (can qualify to be deducted ONLY upon sale of home or real estate)

Financial Assets

- Interest Income Statements from CD's, Savings, & other A/C's: Form 1099-INT & 1099-OID
- Dividend Income Statements: Form 1099-DIV
- Proceeds from broker transactions: Form 1099-B
- Retirement plan distribution: Form 1099-R
- Stocks Sold – (purchase and sale info)

Financial Liabilities

- ❑ Auto loans/leases (account no. & car value) – to qualify vehicle must be used for business
- ❑ Post-Secondary tuition and student loan interest.
- ❑ Early withdrawal penalties on CD's and other time deposits.

Automobiles

- ❑ Personal property tax information

Expenses

- ❑ Gifts to charity (qualified written statement from charity)
- ❑ Cash or Non-Cash Donations (qualified written statement from charity)
- ❑ Unreimbursed expenses related to your job (travel expense, uniform, union dues, subscriptions)
- ❑ Job-hunting expenses
- ❑ Out-of-Pocket Medical expenses
- ❑ Tax Preparation Expense and Fees
- ❑ Safe deposit box fees
- ❑ Personal property taxes paid
- ❑ Adoption expenses
- ❑ Child care expenses (provide, care providers name, federal Id #, or social security #, address, and total amount paid)
- ❑ Federal and State Estimated tax payments (qualified written statement from IRS and State or cancelled check)
- ❑ Alimony paid

Self-employment Data

- ❑ Business income: Forms 1099-MISC and/or own records
- ❑ Partnership SE income: Schedules K-1
- ❑ Business-related expenses: Receipts, others documents & own records
- ❑ Farm-related expenses: Receipts, other documents & own records
- ❑ Employment taxes & other business taxes paid for current year: Payment records

Other Items:

- ❑ If you are a NEW CLIENT, please bring a complete copy of your tax return for the previous tax-filing year.
- ❑ If any forms were mailed to you by the state or IRS that may seem relevant or irrelevant to filing your taxes please bring them as well for us to review, to avoid future errors on your tax return.

POSSIBLE LEGAL DEDUCTIONS

(List amount for items that are relevant to you)

BE SURE TO HAVE RECEIPTS OR WRITTEN PROOF ON THE AMOUNT YOU INDICATE WITH THE ITEMS BELOW.

Medical & Dental Expenses	
Operations/Check-ups	\$
Prescription Drugs	\$
Medical & Dental Insurance	\$
Long-term Care Insurance	\$
Hospital & Emergency Fees	\$
Labs & X-Ray Examinations	\$
Visiting Nurses or In-home	\$
Case Dental Expense	\$
Dentures & Braces	\$
Glasses, Contact Lenses & Eye care supplies	\$
Hearing Aids & Batteries	\$
Orthopedic Shoes	\$
Therapy Treatments	\$
Canes, Crutches, Body Braces	\$
Wheelchairs	\$
On Doctor's Advice	
Air Conditioning	\$
Vaporizing	\$
Thermometers &	\$
Bandages	\$
Other: please indicate	\$
Medical Miles Driven	\$
Other Medical Transportation	\$

Cost

For Customized Possible Deductions please see our list below, and request a chart that is applicable to you.

1. Self-Employed or Business Owners
2. Auto Mechanics
3. Electrician/Handyman
4. Carpet Installers
5. Asbestos Workers
6. Network/Computer Engineers
7. Couriers
8. Flight Attendants
9. Teachers
10. Sales Associates
11. Housekeeper, Maids, & Nannies
12. Journalists/Reporters/Live Producers/Cameramen/Production Managers
13. U.S. Postal Clerks/Rural Carriers
14. Registered Nurses
15. Doctors