



ANA'S MULTI-SERVICES  
Income Tax | Home/Auto Insurance | Notary Public

6223 Bellaire Blvd. Suite 100, Texas 77081. Tel 713.995.6158 Fax 713.995.6190

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## Tax Preparation Checklist

This checklist will assist you in gathering relevant paperwork necessary for us to prepare your federal income tax return.

Note: Some information may not be applicable to you, please disregard it.

### Prior Year Tax Returns

- Last Federal Income Tax filed

### Personal Information

- Social Security Numbers and date of birth (including spouse, children, and other dependents)
- Current Complete Address

### Employment & Income Information

- W-2 Forms and all earning and income received during the year
- Unemployment compensation: Form 1099-G
- Partnership and trust income, Schedule K-1
- Pensions and annuities, retirement plan distributions, form 1099-R
- Jury duty pay
- Social security benefits received
- Gambling and lottery winnings, form W-2G
- Prizes and awards
- Other income, form 1099Misc
- Scholarships and fellowships

### Personal Home Information

- Rental or Miscellaneous Income: Form 1099-MISC
- Mortgage interest: Form 1098
- Sale or purchase of your home or other real estate: Form 1099-S
- Second mortgage interest paid
- Real estate taxes paid

### Financial Assets

- Interest income from banks: Form 1099-INT & 1099-OID
- Dividend income statements from banks: Form 1099-DN
- Proceeds from broker transactions on investment accounts: Form 1099-B



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### **Financial Liabilities**

- Student loan interest paid
- Early withdrawal penalties on CDs and other time deposits

### **Automobiles**

- Tax paid on new motor vehicle purchased

### **Personal Expenses**

- Gifts to charity (receipts for any single donations of \$250 or more)
- Unreimbursed expenses related to volunteer work
- Unreimbursed expenses related to your job (travel expenses, uniforms, union dues, subscriptions, millage etc.)
- Job-hunting expenses
- Job-related Education expenses
- Child care expenses. Social Security Number, Tax ID and address or care provider
- Medical Savings Accounts
- Adoption expenses
- Tax return preparation expenses and fees from prior year
- Residential Energy efficient upgrades to your home such as windows, doors, A/C Units.

### **Self-employment Information**

- K-1s on all partnerships
- Business Income
- A detailed list of business-related expenses
- Employment and business taxes paid during the tax year

### **Other Deductions**

- IRA, 401K & other retirement contributions
- Medical expenses, doctors, hospitals, prescriptions, dentist, insurance premium, etc.
- Casualty or theft losses
- First time home-buyer credits/ REPAYMENT (for 2008-2009 credits)

Any other miscellaneous deductions

**Note: This is only a guide to help you get prepared for a visit to our office.**