

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
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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

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
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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.

