



TAX PREPARATION CHECKLIST

Checklist of Information Needed to Complete Your Tax Return

If any item listed applies to you, please check the box and attach the information.

Income Information:

- ☐ Wages (Form W-2)
- ☐ Interest Income (Form 1099-INT)
- ☐ Foreign Bank Accounts, Income (+/-) Paid Taxes
- ☐ Dividend Income (Form 1099-DIV)
- ☐ Stock Sale Information/Capital Gains (Form 1099-B)
- ☐ *Each Stock Sale: Date Purchased, Number of Shares Purchased, Amount Paid

Other Income

- ☐ *Alimony Received
- ☐ *Unemployment Compensation (Form 1099-G)
- ☐ *Debt Cancellation (Form 1099-C)
- ☐ *Disability Income
- ☐ *Jury Duty

Small Business (Self-Employment or Independent Contractor Business)

- ☐ *Business Income (Form 1099-MISC plus items not on 1099-MISC)
- ☐ *Business Expenses (Provide list)
- ☐ *Vehicle Information

Rental Property

- ☐ *Rental Income (Form 1099-MISC)
- ☐ *Related Expenses (Provide list)

Schedules K-1 from Partnerships, S Corps, Trusts

- ☐ Sale of Real Estate not qualifying for Personal Residence Exemption
- ☐ *Closing Statement-Sale of Property
- ☐ *Closing Statement-Purchase of Property
- ☐ *List of additions/improvements while you owned the property
- ☐ *Forgiveness of Debt Income (Form 1099-C or 1099-A)

NOTE: All Tax Documents Are Required Prior To Scheduling An Appointment.

Deduction Information:

Medical Expenses

_____ * Health Insurance

_____ * Out of Pocket Medical Expenses (Also if applicable include Form 1099-SA)

_____ Forms 1095-A, 1095-B, 1095-C

_____ Healthcare Market Place Exemption

_____ Medical Account Contribution (Form 5498-SA)

_____ ABLE Account Contribution (Form 5498-QA)

_____ Real Estate Taxes

_____ Other (Including Sales Tax Paid on the purchase of autos, boats and RVs for personal use)

Credit and Payment Information:

_____ Child Care Expenses

_____ * Provide Name, Address, Social Security Number or Employer Identification Number, and amount paid for each child

_____ Estimated tax payments (dates and amounts paid)

_____ Legal papers for adoption, divorce or separation involving custody of your dependent children

_____ Tuition Statements (Form 1098-T) / Education Expenses

_____ Copy of voided check (for direct deposit of refund information)

_____ Energy or electric vehicle tax credit information

NOTE: All Tax Documents Are Required Prior To Scheduling An Appointment.

Unearned Income Information:

- _____ Pension Distributions (Form 1099-R)
- _____ Social Security Benefits (Form 1099-SSA)
- _____ State/Local Refunds (Form 1099-G)
- _____ Gambling Income (Form W-2G)
- _____ Tip Income
- _____ Scholarships (Form 1098-T)
- _____ Education Savings Account Withdrawal (Form 1099-Q)
- _____ Bartering Income (Form 1099-B)
- _____ Achieving Better Life Experience Distribution (Form 1099-QA)

Deduction Information:

- _____ IRA Contributions
- _____ SEP, Simple, Keogh Plans
- _____ Student Loan Interest (Form 1098-E)
- _____ Student Expenses (Forms 1098-T & 1099-Q)
- _____ Alimony Paid
- _____ * Recipient Name and SS# Recipient Name Social Security #
- _____ Mortgage Interest (Form 1098)
- _____ Investment Interest
- _____ Cash and Noncash Charitable Contributions
- _____ Business or Disaster Casualty/Theft Loss

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