



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

<input type="checkbox"/> *Recipient Name and SS#	<input style="background-color: #cccccc; width: 100px; height: 15px; border: none; font-size: 10px; color: #cccccc; text-align: center; vertical-align: middle;" type="text"/> Recipient Name	<input style="background-color: #cccccc; width: 100px; height: 15px; border: none; font-size: 10px; color: #cccccc; text-align: center; vertical-align: middle;" type="text"/> Social Security #
<input type="checkbox"/> Mortgage Interest (Form 1098)		
<input type="checkbox"/> Investment Interest		
<input type="checkbox"/> Cash and Noncash Charitable Contributions		
<input type="checkbox"/> Business or Disaster Casualty/Theft Loss		

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