

TAX PREPARATION CHECKLIST

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|--------------------------|---|
| <input type="checkbox"/> | W-2 (Wage Statement) |
| <input type="checkbox"/> | Drivers License |
| <input type="checkbox"/> | Last years return (for new clients only) |
| <input type="checkbox"/> | Dependents' Social Security Numbers and Date(s) of birth. |
| <input type="checkbox"/> | Social Security Card(s) |
| <input type="checkbox"/> | Commissions received or paid |
| <input type="checkbox"/> | Income and Expenses from Rentals |
| <input type="checkbox"/> | Contributions to IRA |
| <input type="checkbox"/> | Alimony - Paid and/or Received |
| <input type="checkbox"/> | Childcare Expenses - Please obtain the information for the Childcare Provider. |
| <input type="checkbox"/> | Medical, Dental, and/or Eye Care Expenses |
| <input type="checkbox"/> | Charitable Donations |
| <input type="checkbox"/> | Settlement Sheets from Purchase and Sale of Residence |
| <input type="checkbox"/> | Personal Property Taxes Paid |
| <input type="checkbox"/> | Real Estate Taxes Paid |
| <input type="checkbox"/> | State and/or Local Taxes Paid |
| <input type="checkbox"/> | Educational Expenses that are Job-Related |
| <input type="checkbox"/> | Estimated Taxes |
| <input type="checkbox"/> | Foreign Taxes Paid |
| <input type="checkbox"/> | Unreimbursed Job Expenses |
| <input type="checkbox"/> | Educator Expenses |
| <input type="checkbox"/> | Casualty or Theft Losses |

FORM CHECKLIST:

| | <u>FORM</u> | <u>DESCRIPTION</u> |
|--|--|---|
| | Form 1099-R | Pension or Retirement Income |
| | Form SSA-1099 | Social Security Income |
| | Form 1099-G | Unemployment Income |
| | Form 1098-E | Student Loan Interest |
| | Form 1098-T | Tuition and Education Fees |
| | Form 1098 | Mortgage/Home Equity Interest Paid |
| | Form 1099-G | State Income Tax Refund |
| | Form 1099-B | Stocks/Bonds Sales Information |
| | Form 1099-INT Form 1099-DIV | Interest and Dividend Income |
| | Form 1099-MISC | Self-Employed Business/Farm Income and Expenses |
| | Schedule K-1 | Income from Partnerships, S Corps, Trusts, & Estates |
| | Form W-2G | Lottery/Gambling Winnings |
| | | Lottery/Gambling Losses |