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Income Tax Checklist

Taxpayer's name	Spouse's name
SSN	SSN
Date of Birth	Date of Birth
Occupation	Occupation
Address	
Phone	

Dependents

Name	SSN	Date of Birth	Relationship
1			
2			
3			
4			
5			

Documents to bring

- W-2S
 any (1099-INTs, 1099-DIVs, 1099s)
 Property Tax Bill
 K-1S
 Last year tax return

QUESTIONS

- 1) Did you pay unusual amount of sales tax last year? Go to section 1
- 2) Did you pay estimated taxes? Go to section 1
- 3) Did you pay Property tax/ mortgage interest last year ? Go to section 3
- 4) Did you pay student loan interest? Go to section 3
- 5) Did you move last year? Go to section 4
- 6) Did you pay medical bills last year? Go to section 5
- 7) Have you experienced casualty or theft loss? Go to section 6
- 8) Have you donated money or items to not for profit organizations? Go to section 7
- 9) Did you make any contribution to retirement account? Go to section 8
- 10) Did you use your car for business purposes? Go to section 9
- 11) Did you pay any child care expenses? Go to section 10
- 12) Did you sell your house? Go to section 12
- 13) Did you trade stock? Go to section 12

1 Taxes

Estate Tax _____
 Personal property tax _____
 City/country tax _____
 Sales tax _____
 Other _____

ESTIMATED PAYMENTS

Taxes	State	Federal
Date paid		
Date paid		
Date paid		
Date paid		

3 Interest Expenses +TAX

Home Mortgage (1098) _____
 Home Mortgage – pd. To others
 (name & SSN of individuals) _____
 Investment Interest _____
 Student Loan Interest(1098-E) _____

5 Medical Expenses

Contributions _____
 Insurance & Medical Premiums _____
 Prescription _____
 Eyeglasses _____
 Doctor’s Visits _____
 Dentists _____
 Hospital _____

8 Retirement

Traditional IRA Contribution Previously /Current
 \$ _____ Taxpayer Year
 \$ _____ Spouse
 Roth IRA Contribution
 \$ _____ Taxpayer
 \$ _____ Spouse

2 Miscellaneous

Dues& subscriptions _____
 Donations _____
 Uniforms _____
 Job seeking expenses _____
 Tools _____
 Equipment _____
 Tax preparation fees _____
 Business Entertainment _____
 Investment & tax advice _____
 Hobby losses _____
 Impairment related work expenses _____
Gambling losses _____
 Classroom expenses for teachers _____
 Energy property installed _____
 Other _____

4 Job Related moving expense

Travel and lodging _____
 Moving household goods _____

6 Casualty and Theft Loss

Cost of property lost _____
 FMV of property _____
 Insurance reimbursement received _____

7 Donations/Charities

Church _____
 Other (goodwill, property cash etc.) _____

9 Business Auto Expenses

Parking and tolls _____
 Business mileage _____
 Gas and oil _____
 Interest _____
 Other _____

10 Child Care expenses

Provider's name	Address	ID # of provider(s)	Amount pd.

11 Education Credits (1098-T)

Name of Institution	Tuition pd.	Who attended

12 Other Income

Sales of stock or the property	Cost	Sales Prices

Other income (bring all figures also supporting data):

Jury duty _____

Alimony (received) _____

Self-employment _____

Social security benefits _____

Estates and trusts _____

Pensions and annuity _____

Partnerships and S corp income _____

Gambling winnings _____

Tips _____

Unemployment (1099-g) _____

Prizes (1099-MISC) _____

Tax refunds _____

Royalties _____

* If you own business or rental property, please provide an income/loss statement and supporting doc

* If you borrowed money and the debt is cancelled or forgiven, please provide us with form 1099-A or 1099-C.