

*Use this checklist to help you gather **your important tax information**.
You can **avoid multiple trips** to our office by gathering all
of the information **before your first visit**.*

PERSONAL DATA

- ☐ Name, Address, Phone number
- ☐ Date of birth (including dependents)
- ☐ Social Security Numbers
(including spouse and children)
- ☐ Child care provider
(Name, address and tax I.D. or SSN)
- ☐ Alimony paid: Social Security Number
- ☐ Employment & Income Data
- ☐ W-2 forms for this year
- ☐ Unemployment compensation
Forms 1099-G
- ☐ Miscellaneous income including rent
Forms 1099-MISC
- ☐ Pensions and annuities: Forms 1099-R
- ☐ Social Security income SSA-1099
- ☐ Alimony received
- ☐ Jury duty pay
- ☐ Gambling and lottery winning (organized)
- ☐ State and local income tax refunds
Form 1099-G

HOMEOWNER / RENTER DATA

- Residential address(es) for this year ☐
- Mortgage interest: Form 1098 ☐
- Second mortgage interest paid ☐
- Rental income during tax year ☐
- Real estate taxes paid ☐
- Sale of your home ☐
or other real estate: Form 1099-S
- Moving expenses ☐

FINANCIAL ASSETS

- Interest income statements ☐
Form 1099-INT & 1099-OID
- Dividend income statements ☐
Form 1099-DIV
- Proceeds from broker transactions ☐
Form 1099-B
- Retirement plan distribution ☐
Form 1099-R

FINANCIAL LIABILITIES

- ☐ Student loan interest paid
(Form from lender)

EXPENSES

- ☐ Gifts to charity
(qualified written statement from charity
for any single donations of \$250 or more)
- ☐ Un-reimbursed expenses related to your job
(travel expenses, uniforms, union dues, subscriptions)
- ☐ Job-hunting expenses
- ☐ Job-related education expenses
- ☐ Child care expenses
- ☐ Medical Savings Accounts
- ☐ Alimony paid

SELF-EMPLOYMENT DATA

- Business income ☐
Forms 1099-MISC and/or own records

- Business-related expenses ☐
Receipts, other documents & own records

- Employment taxes & other business taxes ☐
paid for current year: Payment records

MISCELLANEOUS TAX DOCUMENTS

- Estimated payments ☐
- Estimated tax vouchers, cancelled checks ☐
& other payment records
- IRA, Keogh and other retirement plan ☐
contributions: If self-employed, identify as
for self or employees
- Records to document medical expenses ☐
- Records to document casualty or theft losses ☐