

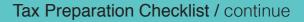
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www.piedracpa.com I info@piedracpa.com (305) 671-0003 I Fax: (305) 671-6263



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	HOMEOWNER / RENTER DATA
Name, Address, Phone number	Residential address(es) for this year
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Date of birth (including dependents)	Mortgage interest: Form 1098
Social Security Numbers (including spouse and children)	Second mortgage interest paid
	Rental income during tax year
Child care provider	Real estate taxes paid
(Name, address and tax I.D. or SSN)	Sale of your home or other real estate: Form 1099-S
Alimony paid: Social Security Number	
Employment & Income Data	Moving expenses
W-2 forms for this year	
Unemployment compensation Forms 1099-G	
1 of the 1000 G	FINANCIAL ASSETS
Miscellaneous income including rent Forms 1099-MISC	Interest income statements Form 1099-INT & 1099-OID
Pensions and annuities: Forms 1099-R	7 51.11 1000 11.11 01.12
Social Security income SSA-1099	Dividend income statements Form 1099-DIV
Alimony received	
Jury duty pay	Proceeds from broker transactions Form 1099-B
Gambling and lottery winning (organized)	Retirement plan distribution Form 1099-R
State and local income tax refunds Form 1099-G	





FINANCIAL LIABILITIES	SELF-EMPLOYMENT DATA
Student loan interest paid (Form from lender)	Business income Forms 1099-MISC and/or own records
	Business-related expenses Receipts, other documents & own records
Gifts to charity (qualified written statement from charity for any single donations of \$250 or more)	Employment taxes & other business taxes paid for current year: Payment records
Un-reimbursed expenses related to your job	MISCELANEOUS TAX DOCUMENTS
<ul> <li>(travel expenses, uniforms, union dues, subscriptions)</li> <li>Job-hunting expenses</li> <li>Job-related education expenses</li> <li>Child care expenses</li> <li>Medical Savings Accounts</li> <li>Alimony paid</li> </ul>	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