

Tax Preparation Checklist – What to bring to appointment

<ul style="list-style-type: none"> <input type="checkbox"/> W2'S <input type="checkbox"/> GAMBLING INCOME (W2-G) <input type="checkbox"/> K-1 (PARTNERSHIP, S-CORP AND TRUSTS) <input type="checkbox"/> RETIREMENT/ PENSION INCOME (1099-R) <input type="checkbox"/> DIVIDEND & STOCK SALES (1099-DIV & 1099-B) <input type="checkbox"/> INTEREST INCOME (1099-INT) <input type="checkbox"/> VARIOUS INCOME (1099-MISC): <ul style="list-style-type: none"> • RENT • ROYALTIES • SSA-1099 (SOCIAL SECURITY) • PRIZE WINNINGS • UNEMPLOYMENT COMPENSATION • ALIMONY RECEIVED <input type="checkbox"/> STUDENT LOAN INTEREST (1098-E) <input type="checkbox"/> TUITION & FEES PAYMENTS (1098-T) <input type="checkbox"/> DAYCARE - WHO, AMT PD, ADDRESS & TAX ID# <input type="checkbox"/> MEDICAL, DENTAL, RX, MILEAGE & VISION BILLS <input type="checkbox"/> HOME MORTGAGE INTEREST (1098-MORT) <input type="checkbox"/> RESIDENTIAL ENERGY IMPROVEMENTS <input type="checkbox"/> EMPLOYEE OR TEACHER EXPENSES <ul style="list-style-type: none"> • UNIFORM • UNION DUES • SAFETY GEAR • BUSINESS MILEAGE • SUPPLIES • JOB SEARCH EXPENSES <input type="checkbox"/> ALIMONY PAID SS# _____ 	<ul style="list-style-type: none"> <input type="checkbox"/> CHARITABLE CONTRIBUTIONS <ul style="list-style-type: none"> • CASH • NON-CASH (CLOTHES & HOUSE ITEMS) • VOLUNTEER MILEAGE <input type="checkbox"/> STATE AND LOCAL TAXES <ul style="list-style-type: none"> • VEHICLES, BOATS, ETC • PROPERTY TAXES • PRIOR YEAR LOCAL & STATE TAXES <input type="checkbox"/> RENTAL PROPERTIES –SEE DETAILED LIST <ul style="list-style-type: none"> • REPAIRS AND MAINTENANCE • TAXES • INSURANCE • ASSETS & PURCHASE DATE <input type="checkbox"/> SELF-EMPLOYED – <i>SEE DETAILED LIST</i> <ul style="list-style-type: none"> • BANK STATEMENTS • GROSS DEPOSITS • LIST OF EXPENSES • NEW ASSETS & PURCHASE DATE • E.I.N. NUMBER? • BUSINESS VEHICLE MAKE & MODEL • ACTUAL VEHICLE EXPENSES • VEHICLE BUSINESS MILEAGE <input type="checkbox"/> PRIOR YEAR TAX RETURN - <u>NEW CLIENTS ONLY</u> <input type="checkbox"/> DRIVERS LICENSE & S.S. CARDS <input type="checkbox"/> RETIREMENT ACCOUNT CONTRIBUTIONS <input type="checkbox"/> ESTIMATED TAX PAYMENTS MADE (FEDERAL, STATE AND/ OR LOCAL) <input type="checkbox"/> CHILDRENS S.S. CARDS AND D.O.B
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