

What should I bring to my tax appointment?

The following CHECKLIST is designed to help you obtain the necessary information to file a complete and accurate return. This CHECKLIST, together with documents noted must be available on your appointment date and provided to your preparer.

WAGES- Forms W-2

INTEREST- Forms 1099-INT

DIVIDENDS- Forms 1099-DIV

STATE AND LOCAL INCOME TAX REFUNDS- Forms 1099 G

BUSINESS INCOME-Schedule of income and expense amount, by category (i.e. rent, taxes, etc.)

CAPITAL GAINS (LOSS)- Forms 1099B, generally, from stocks and bonds. Need purchase date, cost/purchase price, sale date, sale price, if any commissions paid. This information is obtained from broker or historical records of client.

IRA, PENSIONS AND ANNUITIES- Forms 1099 R

**RENTAL REAL ESTATE, ROYALTIES, PARTNERSHIPS, S CORPORATIONS, TRUSTS, ETC.- Schedule of rental income and expense amount, by category (i.e. taxes, interest, repairs, capital items [such as buildings. Land improvements, building improvements, need dates purchased, dates placed in service and costs/purchase price])
Forms- 1099- MISC and Forms K-1**

UNEMPLOYMENT COMPENSATION- Forms 1099-G

SOCIAL SECURITY BENEFITS- Forms SSA-1099, and RPB-1099

OTHER INCOME- Forms W-2G, 1099-MISC, 1099-G, 1099-C

STUDENT LOAN INTEREST- Form 1098-E

QUALIFIED TUITION AND RELATED EXPENSES- Forms 1098 T

MORTGAGE INTEREST DEDUCTION- Form 1098, closing settlement statement if purchased or sold in the current year

REAL ESTATE TAX DEDUCTION- Form 1098, receipts of taxes paid, closing/settlement statement if purchased or sold in the current year.

FEDERAL, STATE AND LOCAL INCOME TAXES PAID-Form W-2, estimated payments to include dates paid and amounts

DEPENDENTS- Names, birth dates and social security cards

DONATIONS- Any donations made to charities (Church, Salvation Army, Good Will)
If you donated a car you need to provide the 1099 that states the value.

EMPLOYEE EXPENSES- Amounts paid for employee expenses, such as Uniforms, Tools, Equipment, License Fees, Liability Insurance, Union dues.

HOME PURCHASE/SALE- Closing/Settlement statement for properties/residences purchased/sold or refinanced in the current year.

NOTE: The items highlighted represent past return problems and therefore give them your utmost attention. Additionally, the above checklist is not all-inclusive and should be presented with documents noted to your preparer. If information is not available this will delay the preparation for your return.