

Your Tax Preparation Appointment And Drop Off Checklist:

*Has your marital status changed?

*Are you being claimed as a dependent by another person?

*Are there any changes in the dependent information from last year?

1. Social Security Numbers and birthdates of ALL dependents
2. W-2's
3. 1099's for interest and dividends (savings accounts, money markets, mutual funds, stocks etc.)
4. Purchase date and cost of stocks and mutual funds sold
5. Other income including Social Security, alimony, canceled debt, lottery winnings, jury duty, unemployment, tips, etc.
6. Rental Property income and expenses
7. Copies of K-1's (Partnership and S-Corps)
8. Pension or IRA distributions 1099's
9. IRA Contributions
10. Child Care Expenses, must include providers name, address, SS number or EIN number
11. College Tuition and Expenses
12. Itemized Deductions:
 - o Medical Expenses
 - o Home Mortgage Interest
 - o Real Estate Taxes
 - o Vehicle License Fee

- o Contributions (cash and goods)
 - o Investment Expense
 - o Education
 - o Job Seeking
 - o Safe Deposit Box
 - o Uniforms
 - o Tax Prep Fees
 - o Custodial Fees
 - o Employee Business expense
 - o Casualty Losses
 - o Interest on other loans, separated
13. Closing Papers from purchase, sale, or refinance of residence
 14. Record of Federal and State estimated tax payments
 15. Rent, include landlords name and address
 16. Sales Tax paid on large ticket purchases (car, furniture, boats etc.)