



Tax Data Checklist

***If we did not prepare your last year Tax Return, please bring in your copy.

Items to bring to your tax appointment:

- Dependents' Social Security Numbers & Dates of Birth **
- Wage statements – Form W2
- Pension or Retirement Income – 1099R
- Interest & Dividend Income – Form 1099INT/Form 1099DIV
- State Income Tax Refund Amount – Form 1099G
- Social Security Income – Form SSA1099
- Unemployment Income – Form 1099G
- Sale of Stock or Bonds – Form 1099B
- Income from Rentals or any K-1s from businesses
- Home Office expenses
- Any Moving Expenses
- Child Care Expenses & Provider Information
- Student Loan Interest – Form 1098E
- If Purchased a home bring in closing statement
- Estimated Taxes Paid
- Tuition paid for college child & self
- Any Use Tax that needs to be reported
- Lottery or Gambling Winnings – Form W-2G
- Cancellation of Debt – Form 1099C
- Alimony paid or received
- Business Income and Expenses

** All Children must have a social security #s and birthdates.

Itemized Deductions

| Medical | Contributions | Miscellaneous Business Expense |
|---|---|--|
| Doctor & Dental \$ _____ | Church \$ _____ | Cell Phone/Beeper \$ _____ |
| Eye Glasses \$ _____ | Clothing/Goodwill \$ _____ | Computer Expense \$ _____ |
| Hospital \$ _____ | United Way \$ _____ | Internet \$ _____ |
| Long-Term Care \$ _____ | | Job Hunting Expense \$ _____ |
| Medical Insurance \$ _____ | | Safety Equipment \$ _____ |
| Prescriptions \$ _____ | | License \$ _____ |
| | | Seminars/Workshop \$ _____ |
| | | Tax Preparation \$ _____ |
| | | Tools \$ _____ |
| | | Uniform/shoes \$ _____ |
| | | Union Dues \$ _____ |
| | | Business |
| | | Mileage _____ miles |
| Taxes | Interest | |
| Real Estate \$ _____ | Mortgage Interest \$ _____ | |
| 2 nd Home \$ _____ | 2 nd Home/Lake Prop \$ _____ | |
| Other Taxes \$ _____ | Home Equity Loan \$ _____ | |
| Use Taxes \$ _____ | | |