



### 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 <sup>nd</sup> Home                     \$ _____	2 <sup>nd</sup> Home/Lake Prop     \$ _____	
Other Taxes                 \$ _____	Home Equity Loan         \$ _____	
Use Taxes                     \$ _____		