Personal Tax Record Checklist

This tax record checklist will help you gather your tax records and receipts for the tax season. Check mark the information provided to us .Payment should be provided before tax preparation is completed or immediately after information is faxed. Please provide us a completed checklist with the following information for tax preparation:

______ **Last Years Tax Return (New Clients)**
______ **Taxpayers Name and Dependents Name**
______ **Taxpayers Date of Birth and Dependents Date of Birth**
______ **Dependents Social Security Number**
______ **Home Address (If Different Then Last Years Return)**

INCOME:
______ Alimony
______ All W-2's
______ Form 1099 miscellaneous income
______ Bank interest ($10 or higher) & stock dividends
______ 1099G Overpayment card state & local income tax refunds
______ Business income (ask for business checklist)
______ Sales of stock, residence and other property
______ Pensions & Annuities
______ Rents & Royalties
______ Farm income
______ Unemployment compensation
______ Social security & railroad retirement
______ Partnership & Trust
______ Gambling & lottery winnings
______ Scholarships & fellowships
______ Other employee compensation
______ Other miscellaneous income

EXPENSES:
_______Alimony paid
_______Student loan interest
_______Casualty & theft losses
_______Charitable contributions, (cash, property, miles)
_______Child & disabled-dependent care
_______Earned income credit
_______Expenses for business use of car
_______Expenses for business use of home
_______Forfeited interest
_______Investment expenses
_______Tuition expenses
_______Job seeking expenses
_______Low income housing credit
_______Medical expenses
_______Moving expenses
_______Personal property taxes (car, boat, etc.)
_______Professional dues
_______Qualified educational expenses
_______Self employment tax

_______Self employed health insurance
_______State & local income tax payments
_______Tax preparation fees
_______Union dues
_______Vocational & job-related expenses
_______Volunteer service (out-of-pocket expenses) (church-scouts-etc)

HOME:
______ Home mortgage interest
______ Real & property taxes
______ Points
______ Form 2119 (if you sold a home before 1999)
______ Closing costs
______ Purchase and sales invoice/HUD-1 (if you purchased your home in 2000)
______ Refinancing

INVESTMENT:
______ End of year ROTH IRA, IRA & KEOGH plan contribution statement
______ End of year brokerage statement
______ Form(s) 1099/end of year mutual fund statement
______ Form(s) 1099/end of year stock & bond statement