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TAX CHECKLIST FOR PERSONAL TAX RETURNS

In order for us to prepare your return more efficiently, please provide us with the following information:

INCOME ITEMS

1. **W-2** Salaries paid to you by your employer.
2. 1099-B Sales of stocks & bonds. (*)
3. 1099-DIV Dividends Earned.
4. 1099-G Unemployment Compensation and/or State or local refund.
5. 1099-INT Interest income earned and **1099-MISC** Freelance work earnings.
6. 1099-R Distributions from IRAs, pensions, annuities.
7. K-1 Earnings from S-Corps, Partnerships, Estates & Trusts.

(*)For each sale listed on the 1099-B, please provide the related purchase information including amount and date acquired.

EXPENSE/DEDUCTION ITEMS

1. **1098** Mortgage Interest paid, Points paid
2. Real Estate taxes paid, and dates they were paid.
3. **Contributions/Donations** made to charity, cash and/or clothing, etc. -If more than \$250 to a particular charity, you must retain a statement from the charity.
4. Un-reimbursed medical expenses and un-reimbursed employee expenses.

OTHER ITEMS

1. If this is the first year we are preparing your tax return, please provide us with the **copy of your last year tax return.**
2. Any new dependents this year? if so please provide full name, date of birth and social security number.
3. If you want your refund electronically deposited to your bank account, **provide your bank routing and account number.** You can find these numbers at the bottom of your personal check, or you can just send us a voided check.
4. Your contact information: **Phone and Email.**
5. Date of births for you, your spouse and your dependents.