

ITEMS TO PREPARE YOUR TAX RETURN

- Names, date of birth, and social security cards for yourself, spouse and all dependents if you are a new client and last year's tax return
- Wages: W-2
- Interest/Dividends: Form 1099-INT
- State Tax Refund: Form 1099-G
- Sale of Stocks: Form 1099-B, Broker Statements
- Sale of Real Estate: Form 1099-S, Escrows-HUD1
- Short Sale/Foreclosure: Form 1099-C
- Distribution of Pension/IRA: Form 1099, Form 1099-R
- Other Income: Form 1099-MISC
- Social Security: Form 1099-SSA
- Gambling Income: W2-G
- Estimated taxes paid during the tax year including the January installment
- Itemized Deductions:
 - o DMV fees paid
 - o Contributions: Donation receipts: cash & non-cash (i.e. clothes, furniture, etc.)
 - o Sale Tax Paid for purchase of: Boat, car, motorcycle, motor-home, or other special item
 - o Work Expenses
 - o Property Tax
 - o Mortgage Interest paid: Form 1098
- Home Office: Homeowners/Renters Insurance, Utilities Taxes, Repairs and other Expenses paid
- Child Care Deductions: Tax ID number, address and phone number for all providers of childcare
- Partnership Income: Form 1065 / Schedule K-1
- Corporation Income: Form 100S / Schedule K-1
- Business Expense: Auto (beginning and ending mileage), all other Expenses
[\(Business Expense form\)](#)
- Rental Expense: Insurance, Repairs, Additions, Travel and all other Expenses
[\(Rental Expense form\)](#)