

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:**
 - **DMV fees** paid
 - **Contributions:** Donation receipts: cash & non-cash (i.e. clothes, furniture, etc.)
 - **Sale Tax Paid for purchase of:** Boat, car, motorcycle, motor-home, or other special item
 - **Work Expenses**
 - **Property Tax**
 - **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 (Please see link for Business Expense form)
- ❖ **Rental Expense:** Insurance, Repairs, Additions, Travel and all other Expenses (Please see link for Rental Expense form)