

Tax Return Checklist

Use this list to checkoff items needed to prepare your tax return:

- W-2s from all your employers
- 1099-INT (interest statements) from all your banks and mutual funds
- 1099-DIV (dividend statements) from your stock broker or mutual fund
- 1099-R (distributions from a pension or IRA)
- 1099-G (Government payments) if you got a state tax refund last year
- 1099-MISC if you had any miscellaneous income from prizes, awards, etc.
- Any other income (jury duty pay, poll worker pay, hobby income, etc)

Itemizing information:

- 1098 Mortgage interest statement
- Property taxes paid (bill from the county or your cancelled check)
- Medical receipts (including mileage, insurance premiums you made, prescription drugs, glasses, hearing aids, dental and doctor amounts paid)
- Personal property taxes (vehicles, mobile home, boat, etc)
- Charitable receipts of noncash donations (include date, amount, description)
- Charitable receipts or canceled checks from your church or charity
- Unreimbursed employee expenses

If you had your own business:

- Any 1099 forms you received for your services as an Independent Contractor
- A list of commissions, payments or sources of income
- Lists of expenses including: auto expenses (mileage), office expenses, legal & professional fees, supplies, telephone, travel and meals, equipment
- Investment, tax return, and safe deposit box receipts

Other, if applicable:

- Child care receipts (provider name, EIN, SSN, address)
- Statements on college tuition paid or interest paid on student loans (including books)

Also, please bring a copy of last year's tax return. If this is your first year with us, please provide all date of births and SSNs.

If you have any questions, please call me at (256)409-1120.

Tax Return Checklist

Use this list to checkoff items needed to prepare your tax return:

- W-2s from all your employers
- 1099-INT (interest statements) from all your banks and mutual funds
- 1099-DIV (dividend statements) from your stock broker or mutual fund
- 1099-R (distributions from a pension or IRA)
- 1099-G (Government payments) if you got a state tax refund last year
- 1099-MISC if you had any miscellaneous income from prizes, awards, etc.
- Any other income (jury duty pay, poll worker pay, hobby income, etc)

Itemizing information:

- 1098 Mortgage interest statement
- Property taxes paid (bill from the county or your cancelled check)
- Medical receipts (including mileage, insurance premiums you made, prescription drugs, glasses, hearing aids, dental and doctor amounts paid)
- Personal property taxes (vehicles, mobile home, boat, etc)
- Charitable receipts of noncash donations (include date, amount, description)
- Charitable receipts or canceled checks from your church or charity
- Unreimbursed employee expenses

If you had your own business:

- Any 1099 forms you received for your services as an Independent Contractor
- A list of commissions, payments or sources of income
- Lists of expenses including: auto expenses (mileage), office expenses, legal & professional fees, supplies, telephone, travel and meals, equipment
- Investment, tax return, and safe deposit box receipts

Other, if applicable:

- Child care receipts (provider name, EIN, SSN, address)
- Statements on college tuition paid or interest paid on student loans (including books)

Also, please bring a copy of last year's tax return. If this is your first year with us, please provide all date of births and SSNs.

If you have any questions, please call me at (256)409-1120.