

## Tax Information Checklist

We've designed this checklist as your personal guide to help prepare you for your visit.

### Personal Information

- Full legal names of taxpayer, spouse, and dependents as shown on Social Security Card
- Social Security Numbers (including spouse and dependents)
- Date of births

### Employment & Income Information

- W-2 forms for this year

### Homeowner Information

- Residential address(es) for this year
- Form 1098: Mortgage interest
- Form 1099-S: Sale of your home or other real estate
- Second mortgage interest paid
- Real estate taxes paid
- Moving expenses

### Financial Assets Information

- Form 1099-INT & 1099-OID: Interest income statements
- Form 1099-DIV: Dividend income statements
- Form 1099-B: Proceeds from broker transactions
- Form 1099-G: Tax Refunds & unemployment compensation
- Form 1099-MISC: Miscellaneous income including rent
- Form 1099-R: Retirement plan distribution
- Schedule K-1: Partners share of partnership investments
- Rental property: Information on gross rents and itemized expenses
- Annual brokerage statements indicating investment sales along with investment cost information

### Financial Liabilities Information

- Auto loans and leases (account numbers and car value) if vehicle used for business
- Student loan interest paid

### Automobile Information

- Personal property tax information
- Expenses for use and miles driven if vehicle used for business, charity, and medical

### Expenses Information

- Gifts to charity (receipts for any single donations of \$250 or more)
- Unreimbursed expenses related to volunteer work
- Unreimbursed expenses related to your job (travel expenses, uniforms, union dues, subscriptions)
- Investment expenses
- Job-hunting expenses
- Education expenses
- Child care expenses with child care provider tax I.D. or social security number and address

### Self-Employment Information

- Income and Form 1099-MISC
- Inventory information
- Receipts or documentation for business-related expenses
- K-1s on all partnerships

### Deductions Information

- State & local income tax payments
- IRA contributions
- Medical expenses
- Casualty or theft losses
- Other miscellaneous deductions