

INDIVIDUAL TAXPAYER PREPARATION CHECKLIST

- | <u>YES</u> | <u>N/A</u> | |
|------------|------------|---|
| _____ | _____ | Taxpayer, Spouse, and/or Dependent(s) birthdays and Social Security Numbers |
| _____ | _____ | Copy of Previous Tax Return (If New Client) |
| _____ | _____ | Dates and Amounts of ALL tax estimates paid |
| _____ | _____ | Obtain ALL of your W-2 Copies |
| _____ | _____ | Gambling Winnings Statements (W-2G's) |
| _____ | _____ | Obtain ALL K-1's from investments in businesses and Estates and Trusts |
| _____ | _____ | Obtain ALL of your 1099's from Banks, Credit Unions, Stock Brokerage Reports Year End Summary, Etc. |
| _____ | _____ | Obtain ALL of your 1099-R's |
| _____ | _____ | Miscellaneous Income Statements (1099-MISC's) |
| _____ | _____ | Government Payments (1099-G's) |
| _____ | _____ | Revenue and Expense Activity Detail from Rental Properties and/or Self-Employed Business |
| _____ | _____ | Social Security Benefit Statements |
| _____ | _____ | Unreimbursed Medical Expenses |
| _____ | _____ | Real Estate Taxes on ALL properties you own |
| _____ | _____ | Mortgage Interest Statements (1098's) |
| _____ | _____ | Unreimbursed Work Related Expenses including Employer(s), Name of Union if Dues were paid, Year, Make, Model for Vehicle Mileage Expenses, Hotels, Meals, and Parking |
| _____ | _____ | Charitable Contributions including Donor Organization Statements/Receipts if \$250 or more to any one Organization |
| _____ | _____ | Student Loan Interest Statements (1098-E's) |
| _____ | _____ | Tuition Statements (1098-T's) and Status of Student |
| _____ | _____ | Qualified Child Care Expenses or Adoption Expenses |

ADDITIONAL INFORMATION AND/OR COMMENTS:
