Tax Guru, LLC

Professional Taxation Services provided by Accounting Gurus

Tax Preparation Checklist

GENERAL

- ❒ *Full names with middle initial as currently on file with Social Security Administration*
- ❒ *Social Security cards or copies for each person on the return*
- ❒ *Social Security numbers for you, your spouse and your dependents*
- ❒ *Birth dates for you, your spouse and your dependents*
- ❒ *Copy of last year's federal and state tax returns*

INCOME

- ❒ *W-2's received*
- ❒ *Bank statements or 1099-INT showing interest received*
- ❒ *Statements or 1099-DIV showing dividends received*
- ❒ *Information for any stock, securities or capital assets transactions including date acquired, purchase price, sales price and date sold*
- ❒ *Refund received from last year's state or local income taxes*
- ❒ *Amount of alimony received*
- ❒ *1099-MISC business income and any related expenses*
- ❒ *Self-employment income, provide all income and expenses for business*
- ❒ *1099-R from pension or IRA distributions*
- ❒ *Schedule K-1's from any partnership, LLC, LLP, trust or S-corporations*
- ❒ *Income and expense information for any rental real estate*
- ❒ *Settlement statement from the purchase of any investment or rental properties*
- ❒ *Unemployment compensation benefits received*
- ❒ *Social Security benefits received*
- ❒ *Other income sources including prizes, scholarships, and fellowships*

DEDUCTIONS

- ❒ *IRA contributions for you and your spouse*
- ❒ *Educational IRA contributions*
- ❒ *Moving expenses*

- ❒ *Keogh or self-employed SEP contribution*
- ❒ *Self-employed health insurance*
- ❒ *Long-term care insurance premiums*
- ❒ *Amount of Alimony paid and social security number of recipient*
- ❒ *Student loan interest paid*
- ❒ *Educational expenses paid for you, your spouse, children, or grandchildren*
- ❒ *Penalty for early withdrawal on savings*

ITEMIZED DEDUCTIONS

- ❒ *Medical, dental and eye care expenses*
- ❒ *Mileage driven for medical purposes*
- ❒ *Real estate taxes paid*
- ❒ *Personal property taxes on cars and/or boats*
- ❒ *Sales or use taxes paid on purchases of vehicles, boats, etc. (optional)*
- ❒ *Home mortgage interest paid including home equity loans*
- ❒ *Points (also called "Origination fee") paid or seller paid points (bring your closing statement)*
- ❒ *Investment interest paid*
- ❒ *Charitable contributions made by cash/check or property contributions*
- ❒ *Mileage driven to charitable activities*
- ❒ *Casualty and theft losses*
- ❒ *Un-reimbursed employee expenses*
- ❒ *Tax preparation fees paid*
- ❒ *Home Office Deduction*
- ❒ *Investment and/or Financial expenses*
- ❒ *Safe deposit box rental or Investment expenses OTHER*
- ❒ *Child or Dependent Care including amount for each child and name, address and federal ID number of each provider*
- ❒ *Estimated tax payments for federal or state and dates paid*
- ❒ *Use of automobile for business*
- ❒ *Residential energy credit information*
- ❒ *529 Plan contributions*
- ❒ *Sale of a home after living there less then 2 years*
- ❒ *Long term care insurance premiums paid*
- ❒ *Details of conversion of traditional IRA's to Roth IRA's*
- ❒ *Details of severance payments received including documentation*

NOTE: For Direct Deposit/Debit, please bring your checkbook to verify your bank account/routing information.

Please call to Schedule an Appointment: NJ Area: (732) 698-2990 NY Area: (888) 672-1TAX(1829) x101