TAX RETURN CHECK LIST

New Clients Only - Copy of Prior Year Tax Return preferably sent prior to appointment

Income

- W2's
- Interest & Dividend Statements (1099's)
- 1099-B for Stock Transactions (If you sold stock) Buys & Sells to include dates and amounts
- Business Income & Expenses categorized (for Sch C)
- Rental Income & Expenses categorized (for Sch E)
- SSA 1099 - Social Security Income
- Other Income ex: Unemployment 1099, Gambling Winnings W-2G or 1099, Non-Employee Comp
- 1099's from Retirement Income (Pension & Annuity, IRA withdrawals)

Expenses

- Medical & Dental (must meet thresholds to qualify)
- Form 1098 – INT for Mortgage Interest and Real Estate Taxes
- Contributions/Donations to charitable organizations
- Job Related Expenses, deductible on State only. (ie. NY State)
- Investment Expenses
- Form 1098T - College Tuition
- HUD-1 Closing Papers (Settlement Charges) if you bought or sold property
- Child Care Expenses along with Tax I.D #, Name and Address of location/person

PLEASE HAVE DATES OF BIRTH AND SOCIAL SECURITY NUMBERS FOR YOU AND ALL YOUR DEPENDENTS