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Individual Tax Return Check List (Page 1 of 2)

We have prepared the following checklist for you to use when gathering your tax information for your scheduled appointment with one of our tax specialists. Please refer to this list to make sure that you bring everything we need to process your tax return quickly. Please read the entire list and make sure that you bring EVERYTHING THAT APPLIES to your situation.

SHORT LIST FOR LESS COMPLICATED TAX RETURNS:

- Driver's license(s) for taxpayer and spouse
- Dependents' Social Security number and Dates of Birth
- Death Certificate if taxpayer, spouse or dependent died during the year
- Wage Statements - Form W-2(s) - We need all forms. If you are missing a W-2, please contact your employer to get a copy
- Pension or Retirement income - 1099-R
- If you have a copy, last year's Federal and State Tax Returns (new clients only)
- Self-Employed Business Income and Expenses (expenses should include all cost of running the business including mileage) - 1099 Misc.
- Child Care Expenses; Provider Information (Name, address and Employer Identification number for provider)
- Direct Deposit information if you want your refund deposited directly to your checking or savings account (Routing number and Account number)

PLEASE REVIEW THE LIST BELOW FOR ANY OTHER ITEMS THAT MAY APPLY TO YOUR TAX SITUATION:

- Interest and Dividend Income - Form 1099-INT/Form 1099-DIV
- State Income Tax Refund Amount - Form 1099-G
- Sales of Stocks or Bonds - Form 1099-B
- Unemployment Income - Form 1099-G



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- Social Security Income - SSA-1099
- Lottery or Gambling Winnings – Form W-2G
- Alimony paid and received – If you paid alimony we need the recipient's Social Security Number.
- Income and Expenses from Rental properties
- Mortgage, Refinance or Home Equity Loan Interest Paid – Form 1098
- Real Estate Taxes Paid
- Medical Expenses paid out-of-pocket (Doctors, Dentists, eye care, prescriptions, hospital, etc.). Medical and charitable "mileage"
- Cash and Non-Cash Charitable Donations –
- Sale of Residence – Closing Documents (e.g. HUD 1 Statement), Form 1099-S
- Un-reimbursed Employment-Related Expenses (including mileage)
- Premium Tax Credit. If you bought healthcare.gov lookout for Form 1095-A.
- Educator Expense – Money spent out-of-pocket as a teacher
- Tuition and Education Fees – Form 1098-T
- Student Loan Interest – Form 1098-E
- Estimated tax payment amounts
- State and Local Tax Payments
- K-1 from Partnerships, S Corporations, Trusts, and Estates
- Any form that says "Do not throw away, Tax Document"