

Tax Tips

TAX RECORD CHECKLIST

Income

- All W-2s
- Other employee compensation (1099's)
- Self-Employment Income (Bank Statements)
- Interest and dividends
- Rents and royalties
- Sales of stock, personal residence and other property
- Alimony
- Pensions and annuities
- Unemployment compensation
- Social Security and Railroad Retirement benefits
- Business and farm income
- State and local income tax refunds
- Gambling and lottery winnings
- Scholarships and fellowships
- Other miscellaneous income

Deductions and Credits

- Tax return preparation fees
- Medical expenses
- Home mortgage interest
- Investment interest and expenses
- Charitable contributions, both cash and property
- Out-of-pocket expenses for volunteer services
- Union and professional dues
- Child and disabled-dependent care expenses
- Job seeking expenses
- Retirement plan contributions
- Expenses for business use of car
- Business travel and entertainment expenses
- Alimony paid
- Moving expenses
- Real and personal property taxes
- Casualty and theft losses
- Qualified educational expenses
- Vocational and job-related expenses
- Forfeited interest
- State and local income tax payments
- Business credits
- DMV fees

Other items required to complete your return:

- Copies of Social Security Cards and Drivers License for the primary taxpayer, spouse and Social Security cards of dependents
- Your birthdate and the birthdate of all dependents
- Current telephone number
- New Address (if applicable)
- Previous Year's Tax Return and Preparation Fee (New Clients only)