

Tax Preparation Checklist



INCOME

- ⇒ Copies of Social Security Cards (taxpayer, spouse & dependents)
- ⇒ Birthdates of Taxpayer, Spouse & Dependents
- ⇒ Valid Mailing Address
- ⇒ Copy of Drivers License (taxpayer & spouse)
- ⇒ W2 Forms (wages)
- ⇒ 1099 Forms (unemployment, misc, retirement, SSA, etc)
- ⇒ Last Years Federal & State Tax Return
- ⇒ Cash or Check Income Not Reported Elsewhere
- ⇒ IRA Contributions
- ⇒ 1099B Forms (stock & bonds sales)
- ⇒ 1099INT/DIV (interest & dividends)
- ⇒ Lottery or Gambling Winnings
- ⇒ 1099G (state refund)
- ⇒ Rental Income and Expense
- ⇒ Alimony Received
- ⇒ Home Sale

- ⇒ Proof of Medical Insurance
- ⇒ Alimony Paid
- ⇒ Medical, Dental, Vision & Prescriptions
- ⇒ Real Estate & Personal Property Taxes
- ⇒ State or Local Taxes Paid
- ⇒ Estimated State & Federal or Foreign Taxes Paid
- ⇒ Cash and Non-Cash Charitable Donations
- ⇒ Mortgage or Home Equity Loan Interest Paid
- ⇒ Educator Expenses
- ⇒ Tuition & Education Fees
- ⇒ Student Loan Interest
- ⇒ Moving Expenses
- ⇒ Casualty & Theft Losses
- ⇒ Child Care Expenses & Provider Information

EXPENSES

Not everyone will have all of the items listed above, but if you do, we will need them to prepare your return.

If you have questions, please call us at 928-333-5988.

If you are dropping off your return, please fill in your name and a valid phone number, so we may call you when we're done.

