TAX YEAR _____

Use this checklist to help you gather your important personal, employment, residential and financial information. Check all that apply.

Name: _____

Address: _____

Phone Number & Email Address: _____

Peace of Mind
Tax Services

Personal Information	√
Taxpayer Social Security/ITIN Numbers and DOB	
Dependent Social Security/ITIN Numbers and DOB	
Driver's License	
Income	√
W-2 wage forms for this year	
Unemployment Compensation (1099-G)	
Miscellaneous Income including rent (1099-MISC)	
Pensions and Annuities (1099-R)	
Social Security/RRI Benefits (RRB-1099)	
Partnership, S Corporation, & Trust Income (Schedule K-1)	
Alimony (received)	
Jury Duty pay	
Gambling and Lottery winnings	
Prize and Awards	
Scholarships and Fellowships	
State and Local Income Tax Refunds	
Homeowner/Rental Information	√
Mortgage Interest (1098)	
Sale of Your Home or other real estate (1099-S)	
Second Mortgage Interest Paid	
Rent Paid during Tax Year (Rent is not tax deductible; however, information may be useful for other tax deductions.)	
Moving Expenses	
Financial Assets	√
Interest Income statements (1099-INT & 1099-OID)	
Dividend Income statements (1099-DIV)	
Proceeds from broker transactions (1099-B)	
Retirement Plan Distribution (1099-R)	
Financial Liabilities	√
Early withdrawal penalties and other time	
Stock and Bond transaction information	

Taxes Paid	√
Federal, State, & Local estimated income tax paid for current year (estimated tax vouchers, cancelled checks & personal payment records)	
Local Personal Property Tax	
State Personal Property Tax	
Real Estate Tax	
Employment Taxes and other business taxes paid for current year (payment records)	
Expenses	√
Gifts to charity (cash and non-cash)	
Unreimbursed expenses related to volunteer work	
Investment Expenses	
Medical Savings Accounts	
Medical Expenses (prescriptions, insurance premiums, medical supplies, eye exams, glasses, contacts, co-pays, medical transportation (miles), other)	
Adoption Expenses	
Alimony Paid	
Tax Return Preparation expenses and fees	
Daycare	√
Childcare Expense	
Name and Address of Provider	
SSN or EIN of Provider	
Education Expenses	√
Job-related education expenses	
Tuition and Education Fees (1098-T)	
Student Loan Interest (1098-E)	
Education Mileage	
Miscellaneous Documents	√
Prior Year tax returns (past 3 available) including income documents (W-2s, 1099s) – NEW CLIENTS	
IRA, KEOGH, and other retirement plan contributions. If self-employed, identify for self or employees.	
Records to document casualty or theft losses	
Records for any other expenditures that may be deductible	
Records for any other revenue for sales of property that may be taxable or reportable	

Business/Employee Expenses	√
Business Income (1099-MISC and/or own records)	
Partnership SE Income (Schedule K-1)	
Employment Taxes and other Retirement Plan Contributions	
Auto Loans and Leases (if for business use)	
Auto Repairs and Expenses (if for business use)	
Entertainment and Meals	
Job Hunting Expenses	
Lodging	
Office in Home	
Professional Dues	
Publications	
Research Expenses	
Safety Equipment	
Supplies	
Telephone	
Tools/Equipment	
Travel	
Union Dues	
Uniform and Cost of Cleaning	
Vocational Supplies	
Other	√