



Premier Mobile Tax Service LLC

Tax Preparation Checklist

Before you begin to prepare your income tax return, go through the following checklist. Highlight the areas that apply to you, and make sure you have that information available. Better yet, attach the list to a folder of your tax documents, and check items off as you add them to the folder.

Personal Data Checklist

- ID's for anyone over 18 years old
- Social Security Cards (including spouse and children)
- Child care provider(s) (Name, address and employer/Tax ID #)
- Birth Certificates for children
- Report cards for children

Employment & Income Data

- W-2 forms for this year
- Unemployment compensation: Forms 1099-G
- Miscellaneous income including rent: Forms 1099-MISC
- Pensions and annuities: Forms 1099-R
- Social Security/RR1 benefits: Forms RRB-1099
- Alimony received
- Jury duty pay
- Gambling and lottery winning
- Scholarships and fellowships
- State and local income tax refunds: Form 1099-G

Homeowner/Renter Data

- Residential address for this year (Rental Agreement)
- Mortgage interest: Form 1098
- Sale of your home or other real estate: Form 1099-S
- Second mortgage interest paid
- Real estate taxes paid
- Moving expenses (Receipts)

Financial Assets

- Interest income statements: Form 1099-INT & 1099-OID
- Dividend income statements: Form 1099-DIV
- Proceeds from broker transactions: Form 1099-B

Financial Liabilities/Expenses

- Auto loans and leases (account numbers & car value) if vehicle used for business
- Student loan interest paid
- Early withdrawal penalties on CDs and other time deposits
- Gifts to charity (qualified written statement from charity for any single donations of \$250 or more)
- Unreimbursed expenses related to volunteer work
- Unreimbursed expenses related to your job
 - travel expenses, uniforms, union dues, subscriptions
- Investment expenses
- Education expenses
- Child care expenses
- Medical Savings Accounts

Self-employment Data

- Business income: Forms 1099-MISC and/or own records
- Partnership SE income: Schedules K-1
- Business-related expenses: Receipts, other documents & own records
- Farm-related expenses: Receipts, other documents & own record

Miscellaneous Tax Documents

- Federal, state & local estimated income tax paid for current year:
(Estimated tax vouchers, cancelled checks & other payment records)
- IRA, Keogh and other retirement plan contributions:
 - If self-employed, identify as for self or employees
 - Records to document medical expenses
 - Records to document casualty or theft losses
 - Records for any other expenditure that may be deductible
 - Records for any other revenue or sales of property that may be taxable or reportable