THE ACCOUNTING SHOPPE LLC
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Preparing for a individual income tax appointment

To ensure that we are able to prepare the most accurate return for you, we need your assistance. Please bring all documents to support income, expense, deductions, or tax credits to your upcoming appointment. To ease the process, we have prepared a quick checklist to help guide you along.

Forms W2	Forms 1099 Int, 1099 DIV, or substitute
Forms 1099-R, 1099-SSA	Brokerage | Investment Tax Statements
Sale of personal property	Sale of real property
Alimony Paid or Received (finalized by 12.31.18)	Business Income & Expense – Self Employment
Rental Income & Expense	Farming Income & Expense
1099-C | Cancellation of Debt	1099-C | Cancellation of Debt
Gambling Income	Foreign Income |Earned | Investments | Assets
Jury Duty Income	Prizes and awards
Income from rental of personal property	Any other items of income of funds received that you are unsure about.
Educator Expenses	Student Loan Interest Paid
Health Savings Account Contributions (Not through payroll deduction)	College Savings Plan Contributions
Long Term Care Premiums Paid	Mortgage Interest (1098)
College Tuition & Fees (1098-INT)	Real Estate & Personal Property Taxes Paid
Charitable Contributions (Cash & Non-Cash)	Any other items of expense or deduction that you are unsure about.

Other Important Documents:

The IRS has increasingly demanded that tax professionals exercise due diligence and document the steps taken to verify accuracy in reporting information through tax returns to the Internal Revenue Service. To satisfy these vigorous requirements, we ask that all new clients please bring the following to your upcoming appointment:

- Driver's license for taxpayer and spouse
- Social security cards for taxpayer, spouse, and all dependents
- Birth certificate for biological or adopted children
- Custody documents for a dependent in your care
- A complete copy of the last three years of completed tax returns

Last but also very important, please jot down any questions or thoughts that you might have as they pertain to your tax circumstances so that we may address any questions or concerns that you might have during your appointment.

We look forward to meeting you. Should you have any questions please give us a call at 804.694.6179

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