

INDIVIDUAL TAX RETURN DOCUMENTS LIST*

Personal Data:

You and your spouse (if applicable)

Please verify that the name on your social security card(s) match the names on your W2 form; or the name your return is being filed under match. If you have moved since the last time your tax return was filed, please verify that we have your correct address on file.

Dependents:

In order to claim a dependent on your tax return you must provide over 50 percent of their support or be the custodial parent. Please remember to bring their social security number and birthdates with you. If you are claiming a child, you do not have custody of, you should have a signed Form 8332.

Income Items:

- All W-2 Forms
- Other Employee Compensation
- Social Security/Railroad Benefits
- 1099-G Prior Year State Tax Refund
- Alimony Received
- K-1's for Partnerships, S-Corps, Estates & Trusts Income
- Scholarships & Fellowships
- 1099-C Cancellation of Debt Income
- Royalty Income

- Interest, Dividends & Other Investment Income
- Sales of Stock & Other Property
- Sale of Personal Residence
This gain will most likely be non-taxable but we will need to confirm this
- 1099-R Pension & Annuity Income
- Gambling & Lottery Winnings
Also have available the total amount of your losses as they may be deductible.
- Unemployment Benefits
- 1099-LTC Long Term Care Benefits
- Any other Income received information

Adjustments to Income:

- IRA Contributions
- Educator Expenses
- HSA Contributions not listed on W-2 Form
- Student Loan Interest
- Alimony Paid
- Early Withdrawal Penalty on Savings Account
- Moving Expenses

Tax Credits:

- Form 1098-T Tuition & Fees
- Dependent Care Credit
Need SSN, Name & Address of Provider
- ACA Credit Information
- Retirement Savings Credit

Estimated Tax Payments: (Date Paid & Amt)

FED:	1 st _____	2 nd _____	3 rd _____	4 th _____
ST:	1 st _____	2 nd _____	3 rd _____	4 th _____

Itemized Deductions:

- Medical Expenses
 - Health Insurance Premiums
 - Dr's, Dentists, Prescriptions etc
 - Long Term Care Premium
 - Medical Mileage
- State & Local Income Taxes Paid
- Real Estate Taxes
Assessments for Sewer, Water, etc. are excluded. Please bring copies of the current year tax bills for verification of assessments & taxable value.
- Personal Property Taxes
Vehicle License Plate Fees
- Home Mortgage & Equity Loan Interest
- Mortgage Insurance Premiums

- Charitable Contributions (Cash)
Must have receipt or copy of the cancelled check.
- Non-Cash Contributions
If the value exceeds \$500.00 you must have an itemized list detailing value
- Safety Deposit Box Fees
- Employee Business Expenses
- Union & Professional Dues
- Casualty & Theft Losses
- Gambling Losses
- Investment Fees
- Job Seeking Expenses
- Prior Year Tax Preparation Charges
- Sales Taxes Paid (Car, Boat, etc.)