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## Tax Return Information Checklist

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614-392-9574

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### General

- \* Completed Client Data Sheet
- \* Proof of Identification & Insurance  
(drivers license, social security card & insurance card)
- \* Special Form of Identification (if you have experienced identity theft)

Certain tax-related identity theft victims will be placed into the Identity Protection PIN program and annually receive a new, six-digit IP PIN

- \* Previous year Tax Return (NOT required if you are a previous client)
  - \* Bank Name, Routing Numbers & Account Numbers (for direct deposit)
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### Income

- \* ALL W-2's
- \* ALL 1099's & 1095 (new form for health insurance)
  - \* Interest
  - \* Dividends
  - \* Foreign Account Information (even if signature on family account)
  - \* Self-employment Income (include receipts for all expenses)
  - \* Sale of Stock Assets or Securities (include buy & sell dates & amounts)
  - \* Cancellation of Debt (should have received a 1099C)
  - \* All K1 Information
  - \* Withdrawals from IRA (Roth or Traditional) / Pension or Retirement Annuity
  - \* Alimony Received
  - \* Rent and Royalties
  - \* Unemployment Compensation
  - \* Social Security, Disability, Etc.
  - \* ANY other income (gambling winnings, rebates, unreported tips, etc.)

### Adjustments to Income

- \* Contributions to IRAs, KEOGHs, SEP, SIMPLE  
( we need to know if you contributed to Roth though it is not a deduction)
- \* Student Loan Interest
- \* Moving Expenses
- \* Medical Savings Account
- \* Health Savings Account (include 1099 information showing distributions)
- \* Educator Expenses

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## Itemized Deductions

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- \* Medical Expenses (vision, dental, co-pays, prescriptions, etc.)
  - \* Sales Tax Information (for vehicles, boats, motor homes, etc.)
  - \* Estimated Tax Payments (federal, state, and city)
  - \* Casualty Loss
  - \* Mortgage Interest (including home equity lines of credit, 2nd mortgage or PMI)
  - \* Real Estate Taxes
  - \* Settlement Papers (if you bought or refinanced a house)
  - \* Charitable Contributions (required receipts, list of items and charitable miles)
  - \* Job Seeking Expenses
  - \* Job Related Expenses (union dues, special uniforms, mileage records, etc.)
  - \* Gambling Losses

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## Miscellaneous

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- \* Child Care Expense (including providers SS#, name, address, and amount)
  - \* Post Secondary Education Expense (1098T and receipt / transcript from bursar's office)
  - \* Signed IRS form from custodial parent (if claiming a child)
  - \* EIC Credit (including documentation proving eligibility - doctors records, insurance cards, school records, etc. of children / dependant)