TAX GURU, LLC

Professional Taxation Services provided by Accounting Gurus

Tax Preparation Checklist

Personal Information
- ❒ Your social security number
- ❒ Your spouse's full name and social security number
- ❒ Dates of birth and social security numbers
- ❒ Childcare records (including the provider's ID number, address and amount paid)
- ❒ Child Tax Credit Advance Payment Amount

Education Payments
- ❒ Forms 1098-T and 1098-E, if you received them
- ❒ Scholarships and fellowships

Employee Information
- ❒ Forms W-2

Self-Employment Information
- ❒ Forms 1099-MISC, Schedules K-1, income records to verify amounts not reported on 1099s
- ❒ Records of all expenses — check registers or credit card statements, and receipts
- ❒ Business-use asset information (cost, date placed in service, etc.) for depreciation
- ❒ Office in home information
- ❒ Percentage of work from home

Vehicle Information
- ❒ Tax Deductible Miles Traveled for Business Purposes
- ❒ Amount of parking and tolls paid
- ❒ If you want to claim actual expenses, receipts or totals for gas, oil, car washes, licenses, personal property tax, lease or interest expense, etc.

Rental Income
- ❒ Records of income and expenses
- ❒ Rental asset information (cost, date placed)

Retirement Income
- ❒ Pension/IRA/annuity income (1099-R)
- ❒ Social security/RRB income (1099-SSA, RRB-1099)

Savings and Investments
- ❒ Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
- ❒ Income from sales of stock or other property (1099-B, 1099-S)
- ❒ Dates of acquisition and records of your cost or other basis in property you sold
- ❒ Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
- ❒ Expenses related to your investments

Other Income
- ❒ Unemployment compensation received
- ❒ State tax refund (1099-G)
- ❒ Foreign Income (Rental and/or Business)
- ❒ Gambling income (W-2G or records showing income, as well as expense records)
- ❒ Record of alimony paid/received with ex-spouse's name and SSN
- ❒ Jury duty records
- ❒ Other 1099

Tax Estimate Payments
- ❒ Estimated tax payments made (Form 1040-ES)
- ❒ Last Year's tax return over-payment

Itemizing Deductions
- ❒ Forms 1098 or other mortgage statements
- ❒ Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
- ❒ Real estate and personal property tax records
- ❒ Foreign taxes paid
- ❒ HUD statement showing closing date of home purchase
- ❒ Cash amounts donated to houses of worship, schools, other charitable organizations
- ❒ Records of non-cash charitable donations
- ❒ Amounts paid for healthcare insurance and to doctors, dentists, hospitals
- ❒ Amounts of miles driven for charitable or medical purposes
- ❒ Amount paid for preparation of your prior year tax return
- ❒ Employment-related expenses (dues, publications, tools, uniform cost and cleaning, travel)
- ❒ Job-hunting expenses
- ❒ Traditional IRA basis

NOTE: For Direct Deposit/Debit, please verify your bank account & routing information.

Please Call to Schedule an Appointment: (844) 679-5639 (732) 698-2990