City Center Tax Group

Tax Appointment Checklist

	Description	✓
1.	Last year's tax returns (if not prepared by this office)	
2.	W-2 Forms	
3.	1099 Forms for interest and dividends, sale of stock/mutual funds	
4.	1099-R Forms for pension and IRA distributions	
5.	Small business income and expenses including 1099-MISC forms received	
6.	Rental property income and expenses	
7.	Statement of IRA contributions made	
8.	Other Income: Alimony, gambling, hobby, cancellation of debt	
9.	Foreign account statements (not reported on mutual fund or brokerage account)	
10.	Cryptocurrency account statements	
11.	Childcare expenses	
12.	Settlement statements from purchase and/or sale or refinancing	
13.	Itemized Deductions:	
	- Medical expenses	
	- Real estate taxes	
	- Personal property taxes	
	- Mortgage interest statements	
	- Charitable contributions – cash and non-cash receipts and statements	
14.	Tuition Savings Plan (529 Plan) contributions and/or Form 1099-Q	
15.	Student loan interest statement – Form 1098-E	
16.	College tuition and fees (Form 1098-T), books and supplies receipts	
17.	Record of federal and state estimated tax payments	
18.	Health Insurance forms 1095-A, 1095-B, 1095-C	
19.	Driver's licenses for taxpayer and spouse	
20.	IRS and/or state correspondence received	

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