



## Tax Prep Checklist

### Bright Bookkeeping Services

#### **New Clients**

Last Year's Tax Return  
Your/Spouse/Dependent's SSNs  
Birthdate Information (You, Spouse, Dependents)  
Drivers License Information (You & Spouse)

#### **All Clients**

|   |                                      |
|---|--------------------------------------|
| All W'2, 1099s & 1098 forms               | Interest & Dividend Income(1099-DIV) |
| Pension & Retirement Income               | Gambling Winning/Loses               |
| Social Security/Unemployment              | Jury Duty Pay                        |
| Alimony Paid or Received                  | Hobby income & expenses              |
| State/Local Refunds(1099G) or Amount Due  | Year-End IRA, 401K Statements        |
| Stock Purchase & Sale Cost/Dates(1099-B)  | Education Exp./Student Loan Interest |
| Legal Documents(divorce,adoption,custody) | Moving Expenses                      |
| Child Care Expenses/Documentation         | DMV Fees Paid on Vehicles            |
| Interest Paid (Mortgage,Care, Etc.)       | Taxes Paid (Real Estate,Sales, Etc.) |
| Medical & Dental Expenses                 | HSA Contributions 5498-SA            |
| Work Related Expenses/Mileage Log         | Estimated State & Federal Payments   |
| Purchase or Sale of Residence Records     | Charitable Donations                 |

#### **Business/Rental Clients**

|                                   |                                 |
|-----------------------------------|---------------------------------|
| Self-Employment Income & Expenses | Income & Expenses from Rentals  |
| Office-In-Home Information        | Mileage Log/Vehicle Information |

Any Other Information You May Feel Necessary