

INCOME TAX PREPARATION ITEMS TO BRING CHECKLIST

Please be sure to remove all important documentation from the envelopes in which they were originally mailed. Also, please make every effort to have your items organized in the same order they appear here. This will help to make your first/initial appointment run smoothly. Thank You!

- _____ 2010 Tax Return (new clients only)
- _____ Most Recent Pay Stub(s)
- _____ W-2 Statements
- _____ Misc. Income (1099-Misc)
 - _____ If from Self-Employment Income, be sure to include an itemized expense list
 - _____ Unemployment (1099-G), Social Security Income (SSA-1099)
 - _____ Alimony, Gambling (W2-G)
- _____ Interest Income (1099-INT)
- _____ Dividends/Stock Sales (DIV, 1099-B)
- _____ Year-End Investment Statements (403(b), 401(k), IRA, Roth IRA)
- _____ State Refund (1099-G)
- _____ Pension Distributions (1099-R)
- _____ Rental Property (Property Info, List of Income and Expenses)
- _____ Student Loan Interest (1098-E)
- _____ Tuition and Fees (1098-T)
- _____ Child Care Expenses

Itemized Deductions

- _____ Medical/Dental Expenses/Prescription Drugs (7.5% AGI)
- _____ Mortgage Interest (1098)
 - _____ Re-Fi/Purchase Expenses
- _____ Property Tax
- _____ Car Registration (Licensing Fee)
- _____ Charity and Cash Donations
- _____ Job-Related Expenses: Union Dues, Faculty Dues, Classroom Supplies, Etc.
 - _____ Union Dues
 - _____ Faculty Dues
 - _____ Classroom/Office Supplies, Tools, Equipment
 - _____ Travel related to work
 - _____ Continuing Ed. Expenses
- _____ Investment Expenses (advice, fees)
- _____ Safety Deposit Box

Additional Considerations!

- _____ Did you Buy a Home in 2010?
- _____ Any Energy Efficient Home Improvements?