

## 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!*

- \_\_\_\_\_ 2014 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 (10% 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, 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/Sell/Re-Fi a Home in 2014? (if so, include closing statement)
- \_\_\_\_\_ Any Energy Efficient Home Improvements? (if so, include receipts)
- \_\_\_\_\_ Any children born this year? (if so, please include SSN)