

## CHECKLIST OF ITEMS TO PROVIDE FOR TAX RETURN PREPARATION

<b>ITEM</b>	<b>USE THE FOLLOWING</b>
Wages	<input type="checkbox"/> W-2
Health Insurance	<input type="checkbox"/> 1095 A or B and/or C
Interest / Dividends	<input type="checkbox"/> 1099-INT / DIV
State Tax Refund	<input type="checkbox"/> 1099-G
Gain on Sale of Stocks	<input type="checkbox"/> 1099-B (Broker Stmt. for cost basis)
Sale of Real Estate	<input type="checkbox"/> 1099-S, Escrows, 1099-C
Distribution of Pension / IRA	<input type="checkbox"/> 1099, 1099-R
Independent Contractor work	<input type="checkbox"/> 1099-NEC
Rents	<input type="checkbox"/> 1099-MISC - Rents
Other Income	<input type="checkbox"/> 1099-MISC
Gambling Income	<input type="checkbox"/> W2-G
Mortgage Interest Banks	<input type="checkbox"/> 1098
Mortgage Interest Individual	<input type="checkbox"/> Tax ID number and address of Individual
Home Purchase or Re-Finance	<input type="checkbox"/> Closing Disclosure / Final Settlement Stmt.
Contributions	<input type="checkbox"/> Cancelled checks and/or letters for amounts over \$500
Itemized Deductions	<input type="checkbox"/> DMV fees paid, Non-Cash Donations, etc.
Business Expense	<input type="checkbox"/> Auto (beginning and ending mileage) and all other Business Expenses
Home Office	<input type="checkbox"/> Homeowners/Renters Insurance, Utilities, Taxes, Repairs and other Expenses paid
Rental Expense	<input type="checkbox"/> Insurance, Repairs, Additions, Travel and all other Expenses related
Child Care Deductions	<input type="checkbox"/> Tax ID number, Address and Phone number for all Providers of childcare
Estimated Taxes paid	<input type="checkbox"/> Payment confirmations or Cancelled checks
Partnership Income	<input type="checkbox"/> Schedule K-1 and applicable State form
Corporation Income	<input type="checkbox"/> Schedule K-1 and applicable State form