

## CHECKLIST OF ITEMS TO BRING FOR TAX RETURN

<b>ITEM</b>	<b>BRING THE FOLLOWING</b>
Wages	<input type="checkbox"/> W-2
Interest / Dividends	<input type="checkbox"/> 1099-INT
State Tax Refund	<input type="checkbox"/> 1099-G
Gain on Sale of Stocks	<input type="checkbox"/> 1099-B, Broker Statements
Sale of Real Estate	<input type="checkbox"/> 1099-S, Escrows, 1099-C
Distribution of Pension / IRA	<input type="checkbox"/> 1099, 1099-R
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"/> Escrow Stmt. / HUD Stmt.
Contributions	<input type="checkbox"/> Cancelled checks and/or letters for amounts over \$250
Itemized Deductions	<input type="checkbox"/> DMV fees paid, Non-Cash Donations, etc.
Business Expense	<input type="checkbox"/> Auto (beginning and ending mileage), all other Expenses
Rental Expense	<input type="checkbox"/> Insurance, Repairs, Additions, Travel and all other Expenses related
Home Office	<input type="checkbox"/> Homeowners/Renters Insurance, Utilities Taxes, Repairs and other Expenses paid
Child Care Deductions	<input type="checkbox"/> Tax ID number, address and phone number for all Providers of childcare
Children under 14 with Interest / Dividends earned	<input type="checkbox"/> 1099-INT / DIV
Estimated Taxes paid	<input type="checkbox"/> Cancelled checks
Partnership Income	<input type="checkbox"/> Form 1065 / Schedule K-1
Corporation Income	<input type="checkbox"/> Form 100S / Schedule K-1