

Bring This Information for the Preparation of Your Tax Return

INCOME

GENERAL

- W2 Forms
- Interest Income (Form 1099-INT)
- Dividend Income (Form 1099-DIV)
- Business Income (Forms 1099-MISC)
- Income from S-Copr, LLC or Partnership (Form K1)
- Retirement Income (Form 1099-R)
- Social Security Income (Form SSA)
- Alimony Received
- Other Income, including Gambling

STOCK SALES

- Name of Stock
- Buy Date
- Sell Date
- Buy Amount
- Sell Amount
- Sale of Real Estate

MUTUAL FUND SALES

- Name of Fund
- Sell Date
- Sell Amount
- Average Cost Basis

DEDUCTIONS

ITEMIZED

- Mortgage Interest
- Real Estate Taxes
- PMI Insurance
- State Taxes
- Contributions - Cash
- Contributions - Non-Cash
- Medical Expenses

SPECIAL

- Moving Expenses
- Tuition
- Student Loan Interest
- Alimony Paid
- Self Employment Health Ins.
- Teacher Expenses
- Health Savings Account

EMPLOYEE BUS. EXP.

- Milage or Actual Expenses
- Travel
- Meals & Entertainment
- Supplies
- Telephone
- Internet
- Dry cleaning
- Computer
- Other Expenses

MISC.

- Investment Interest & Expenses
- Tax Preparation Fee
- Job Hunting Exp.
- Safe Deposit Box
- Wages of In-Home Nanny
- Health Insurance
- Long Term Care Insurance
- Adoption Expenses

1099 CONTRACTOR/BUSINESS

- Total Income
- Advertising
- Milage or Actual Auto Exp.
- Cleaning & Maint.
- Commissions
- Insurance
- Leagl & Professional
- Repairs
- Supplies
- Taxes & Licenses
- Telephone
- Internet Service
- Office Expenses
- Home Office Expenses
- Other Expenses

RENTAL PROPERTY

- Rents Received
- Mortgage Interest
- Real Estate Taxes
- Insurance Costs
- Auto & Travel Exp.
- Cleaning & Maint. Exp.
- Repairs
- Supplies
- HOA or Condo Fees
- Commissions
- Management Fees
- Legal & Professional Fees
- Utilities

DEPENDENTS

- Name
- Date of Birth
- Social Security #

CHILD CARE CREDITS

- Amount paid for each child
- Name of Child Care Provider
- Address of Child Care Provider
- Federal ID # of Care Provider

TAX CREDITS

- Tuition Expenses
- Resident Home Energy Improvements
- Hybrid Car Purchase

New Clients: Please bring a copy of your LAST YEAR'S TAX RETURNS, any other documents marked "Important Tax Information," and any other information you think may be important for the preparation of your return.