Checklist of items required for preparing your taxes

Personal Data

- Social Security Numbers (including spouse and children)
- New Dependent Information (Full name, Birthday, SS#)
- Child care provider tax I.D. or Social Security Number
- Date of birth (including spouse and children)
- Prior year tax return (if new client)
- Check spouse name with social security card

Employment & Income Data.

- W-2 forms for this year
- 1099 forms
- Partnership and trust income
- Pensions and annuities
- Alimony received
- Jury duty pay
- Gambling and lottery winnings
- Prizes and awards
- Scholarships and fellowships
- State and local income tax refund

Financial Liabilities

- Auto loans and leases (account numbers and car value) if vehicle used for business
- Student loan interest paid
- Early withdrawal penalties on CDs and other time deposits

Automobiles

- Personal property tax information (Virginia clients only)
- Vehicle mileage - if used for business (business and personal)

Self-employment Data

- K-1s on all partnerships
- Receipts or documentation for business-related expenses
- Farm income

Deduction Documents

- State & local income tax: your 2014 & 2013 estimated tax vouchers paid in 2014
- IRA, Keogh & other retirement plan contributions
- Medical expenses
- Sales and Use Taxes

Homeowner/Renter Data

- Residential address (es) for this year
- Mortgage interest: Form 1098
- Sale of your home or other real estate: Form 1099-S and settlement sheets
- Second mortgage interest paid
- Real estate taxes paid
- Rent paid during tax year
- Moving expenses
- Refinanced mortgage - settlement sheet
- Mortgage insurance premium … on 1098

Financial Assets

- Interest income statements: Form 1099-INT & 1099-OID
- Dividend income statements: Form 1099-DIV
- Proceeds from broker transactions: Form 1099-B
- Tax refunds & unemployment compensation: Form 1099-G
- Miscellaneous income including rent: Form 1099-MISC
- Retirement plan distribution: Form 1099-R
- Retirement plan statements (IRA and 401K)
- Casualty or theft losses - big losses

Expenses

- Gifts to charity (need all receipts)
- Unreimbursed expenses related to volunteer work
- Unreimbursed expenses related to your job (travel expenses, entertainment, uniforms, union dues, subscriptions)
- Investment expenses
- Job-hunting expenses
- Education expenses
- Child care expenses
- Medical Savings Accounts
- Adoption expenses
- Alimony paid
- Tax return preparation expenses and fees (new clients only)