


PERSONAL TAX PREPARATION

Read First: The following information will be used to complete your personal tax return.


When you see this camera icon  proof of the document is required. You can scan, take a picture with your smartphone and text, email or fax the necessary forms. If an item on the checklist is not applicable to you, write N/A and disregard the camera icon.

PERSONAL INFORMATION


- Social Security numbers and dates of birth for you, your spouse, your dependents.


- Bank account number and routing number, if depositing your refund directly into your account.

- PDF copies of last year's tax return for you and your spouse (helpful, but not required).


- Picture of your driver's license (ID required for new clients). 


ABOUT YOUR INCOME

- Include all W-2 forms for you and your spouse. 


- Include all 1099-C forms for cancellation of debt. 


- Include 1099-G forms for unemployment income, or state or local tax refunds. 

- Include 1099-MISC forms for you and your spouse (for any independent contractor work). 


- Include 1099-R, Form 8606 for payments/distributions from IRAs or retirement plans. 

- Include 1099-S forms for income from sale of a property. 

- Include 1099-INT, -DIV, -B, or K-1s for investment or interest income. 

- Include SSA-1099 for Social Security benefits received. 

- Alimony received (list total annual amount) \$_____

- Prior year instalment sale information - Forms 6252 (principal and interest collected during the year, SSN and address for payer). 

- Miscellaneous income: jury duty, gambling winnings, medical savings account, scholarships, etc.

ADJUSTMENTS TO YOUR INCOME

The following items can help reduce the amount of your income that is taxed, which can increase your tax refund or lower the amount you owe.

- Include Form 1098-E for student loan interest paid (or loan statements for student loans). 📷
- Include Form 1098-T for tuition paid (or receipts/cancelled checks for tuition paid for post-high school). 📷
- Include Form 1095-A/B/C (healthcare insurance coverage). 📷
- For teachers: Include cancelled checks or receipts for expenses paid for classroom supplies, etc.
- IRA contributions made during the year \$ _____
- Total amount paid for qualifying energy-efficient home improvements (solar, windows, etc.) \$ _____
- Medical Savings Account (MSA) contributions \$ _____
- Self-employed health insurance payments \$ _____
- Alimony paid \$ _____
- Keogh, SEP, SIMPLE, and other self-employed pension plan contributions \$ _____
- Child care costs: provider's name, address, tax ID, and amount paid.

- Education costs: Include Form 1098-T, education expenses.
- Adoption costs: Include SSN of child, medical and transportation cost.

- Include forms 1098: Mortgage interest, private mortgage insurance (PMI), and points paid. 📷
- Investment interest expenses \$ _____
- Charitable donations: value of donations, value of property, miles driven and out-of-pocket expenses. \$ _____
- Out of pocket medical and dental expense \$ _____
- Casualty and theft losses: amount of damage and any insurance reimbursements.
Damage \$ _____ Reimbursements \$ _____
- Any miscellaneous tax deductions: union dues; unreimbursed employee expenses (uniforms, supplies, seminars, continuing education, publications, travel, etc.) \$ _____
- Home business expenses: home size/office size, home office portion of expenses.

ALREADY PAID

- Real estate taxes paid \$ _____
- State and local income taxes paid \$ _____
- Personal property taxes paid \$ _____
- Vehicle license fees paid \$ _____
- Estimated tax payments made during the year (self-employed) \$ _____
- Prior-year refund applied to current year \$ _____
- Foreign bank account information: location, name of bank, account number, peak value of account during the year.

SOLD PERSONAL HOME

- Sold a personal home
 - Date \$ _____
 - Original purchase price of the home \$ _____
 - Selling price of your home \$ _____
 - How long did you own the home? _____
 - How many years did you live in the home out of the last five? _____

Add Additional Notes:
