



Personal

If you are a new client please bring copies of all items with an * listed below for anybody listed on your tax return. If you are a prior year client please bring the items with a * next to it for anybody you did not include on your 2007 Tax Return.

- _____ *Social Security Cards (Spouse, children and dependents)
- _____ *Drivers License (Taxpayer and Spouse)
- _____ Children and Dependents Date of Birth
- _____ Childcare provider (Name, address and tax I.D. or Social Security Number)
- _____ Alimony Paid (Social Security Number)
- _____ Last Years Federal and State Returns if possible (Does Not Apply to Prior Year Clients)

Employment and Income

Please review the following checklist and bring in the documents listed in (parenthesis) if any.

- _____ W-2 forms (for this tax year)
- _____ Unemployment Compensation (Form 1099-G)
- _____ Misc. Income and Rental Income (Form 1099-MISC)
- _____ Partnership, S-Corporation, Trust and Estate Income (Schedule K-1)
- _____ Pensions and Annuities (Form 1099-R)
- _____ Social Security, RR1 Benefits (Form RRB-1099)
- _____ Alimony Received
- _____ Commissions Received/Paid
- _____ Jury Duty Pay
- _____ Gambling and Lottery Winnings
- _____ Prizes and Awards
- _____ Scholarships and Fellowships
- _____ State and Local Income Tax Refunds (Form 1099-G)
- _____ Rental Income

Homeowner, Renter Info

- _____ Residential Addresses for the Tax Year
- _____ Mortgage Interest (Form 1098)
- _____ Points Paid on Mortgage
- _____ Sale of Your Home or Other Real Estate (Form 1099-S)
- _____ Second Mortgage Interest Paid
- _____ Real Estate Tax Paid
- _____ Rent Paid During the Year
- _____ Moving Expenses

Financial Assets

- _____ Interest Income (Forms 1099INT & 1099-OID)
- _____ Dividend Interest Statements (Form 1099-DIV)
- _____ Proceeds from Broker Transactions, Sales from Stocks or Bonds (Form 1099-B)
- _____ Retirement Plan Distribution (Form 1099-R)

NOTE* Some financial institutions will not allow a joint refund to be deposited to an individual account. If the direct deposit is rejected, a check will be sent instead. The IRS is not responsible if a financial institution rejects a direct deposit.



Financial Liabilities

- _____ Business Auto Loans and Leases (Account Numbers and Values)
- _____ Student Loan Interest Paid
- _____ Early Withdraw Penalties on CD's and Other Time Deposits

Automobiles

- _____ Tax paid for Automobile/Boat Purchase, Yearly Tag Renewal, Other Tax on Vehicle

Expenses

- _____ Medical, Eye Care and Dental Expenses (Taxpayer, Spouse and Dependents)
- _____ Gifts to Charity (Written Statement for any single donation of \$250 or More)
- _____ Unreimbursed Expenses to Work as a Volunteer
- _____ Unreimbursed Expenses to Work at your Job (Travel, Uniforms, Uniform Cleaning, Union Dues, Subscriptions)
- _____ Investment Expenses
- _____ Educator Expenses
- _____ Safe Deposit Box (Business or Investments)
- _____ Employment Related Moving Expenses
- _____ Home Office Expenses
- _____ New Business Start-up Costs
- _____ College/University Expenses (Hope and Lifetime Learning Credit)
- _____ Job-Hunting Expenses
- _____ Job-Related Education Expenses
- _____ Child Care Expenses
- _____ Medical Savings Account
- _____ Adoption Expenses
- _____ Alimony Paid
- _____ Rental Expenses
- _____ Tax Return Preparation Fees

Self Employment Info

- _____ Business Income (Forms 1099 MISC and Business Records)
- _____ Partnership Income (Schedule K-1)
- _____ Business Related Expenses (Receipts, Documents and Records)
- _____ Farm Related Expenses (Receipts, Documents and Records)
- _____ Employment Taxes & Other Business Taxes Paid for Current Year (Payment Records)

Miscellaneous Tax Documents

- _____ Federal, state & local estimated income tax paid for current year (Estimated tax vouchers, cancelled checks & other payment records)
- _____ IRA, Keogh and other retirement plan contributions (If self-employed, identify as for self or employees)
- _____ Estimated Taxes Paid
- _____ Foreign Taxes Paid
- _____ Casualty and Theft Records
- _____ Other Deductible Expense Records
- _____ Other Revenue or Sales of Property Records that may be Taxable

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