

CHECKLIST FOR TAX PREPARATION

- + Phone number where you can be reached today
- + Taxpayer Name
- + Taxpayer SS#
- + Taxpayer Birthdate
- + Current Address
- + Spouse Name
- + Spouse SS#
- + Spouse Birthdate
- + Current Address (if different)
- + Dependents' Names, Social Security Numbers and Dates of Birth:
 - o Dependent #1 Name
 - o Dependent #1 SS#
 - o Dependent #1 Birthdate
 - o Dependent #2 Name
 - o Dependent #2 SS#
 - o Dependent #2 Birthdate
 - o Dependent #3 Name
 - o Dependent #3 SS#
 - o Dependent #3 Birthdate
- + All Wage Statements (W-2s, 1099Misc, etc)
- + Filing status (Single, Married Filing Jointly, Married Filing Separately, Head of Household,
+ or Qualifying widower)
- + Self-Employed Business Income and Expenses Totaled (Form 1099-Miscellaneous) and all expenses related to this income
- + Pension, Retirement Income (Form 1099-R)
- + Interest and Dividend Income (Form 1099-int or Form 1099-div)
- + Sale of Stocks or Bonds (Form 1099B), and the basis in any stock sold
- + Student loan interest paid
- + Lottery or Gambling Winnings, and the amount of money spent while earning gambling winnings
- + State Refund Amount from 2006
- + Social Security / Unemployment Income (SSA or 1099G)
- + Income and Expenses from Rental Homes
- + Alimony Paid or Received and the social security number of the recipient/payor
- + Medical and Dental Expenses
- + Real Estate and Personal Property Taxes (car tax)
- + Estimated Taxes Paid (both State and Federal)
- + Cash and Non-Cash Charitable Donations and receipts
- + Mortgage or Home Equity Loan Interest Paid (Form 1098)
- + Unreimbursed Employment-Related Expenses Totaled
- + Educational Expenses
- + Child Care Expenses & Provider Information (including EIN or Social Security Number and address of provider)
- + Copy of Last Year's Tax Return