

TAX PREPARATION CHECKLIST



The following is a checklist of items that you should look for and bring with you to your appointment this year.

- W-2's From Employers
- 1099 INT (Bank Interest)
- 1099 DIV (Dividend Interest)
- 1099B (Investment Statements/Capital Gains/Losses)
- IRA, 401(k), 403 (b), TSP or Employer Retirement Plan Statements
- 1099R (Pension and Retirement Income)
- SSA (Social Security Income)
- 1099G (State Tax Refund from Prior Year)
- Unemployment Compensation
- 1099 MISC (Self Employed, Independent Income)

DEDUCTIONS

- IRA Contributions
- Student Loan Interest/Tuition. and Fees
- Charitable Contributions (Summary)
- Medical Expense (Summary)
- 1098 (Mortgage Interest and Property Tax Statement)

****IF YOU ARE A NEW CLIENT****

PLEASE INCLUDE A COPY OF YOUR MOST RECENT TAX RETURN