



Taxpayer Checklist for Personal Taxes



Tax Guide Series

Identification	<input type="checkbox"/> Social Security Card(s) <input type="checkbox"/> Driver's License(s) <input type="checkbox"/> Social Security Cards/Numbers for Taxpayer, Spouse & Dependent(s) <input type="checkbox"/> Dates of Birth for Taxpayer, Spouse & Dependent(s)
Income	<input type="checkbox"/> State Refund Amount (from previous tax year) <input type="checkbox"/> W-2's <input type="checkbox"/> 1099 form(s), including income from: <ul style="list-style-type: none"> - Social Security - Unemployment - Pension &/or Annuity - Interest & Dividends
Child Care Expenses	<input type="checkbox"/> Employer ID# (EIN) or Social Security Number of the Day Care Provider <input type="checkbox"/> Address of Child Care Provider <input type="checkbox"/> Amount Paid to Child Care Provider
Self-Employment	<input type="checkbox"/> Business Expenses and Income (Please see our <i>Business Expenses Checklist</i> , if applicable)
Other Income	<input type="checkbox"/> Commissions Received <input type="checkbox"/> Sales of Stocks/Bonds (Original Amount Paid <u>and</u> Sale Amount) <input type="checkbox"/> Lottery Winnings (& Losses, if applicable) <input type="checkbox"/> Alimony Received <input type="checkbox"/> Retirement/401(k) Withdrawal
Education	<input type="checkbox"/> 1098 with Education Costs <input type="checkbox"/> 1098 with Student Loan Interest Paid <input type="checkbox"/> Job-Related Education Expenses
Real Estate & Personal Property Taxes	<input type="checkbox"/> Mortgage Interest Statement (Form 1098) <input type="checkbox"/> Real Estate Taxes
Donations	<input type="checkbox"/> List Your Charitable Contributions (Cash and Non-Cash); including offerings at church, and other items donated to Goodwill, etc.
Job Related Expenses	<input type="checkbox"/> Un-reimbursed Employment— Job Related Expenses (i.e. Uniforms, scrubs, dry cleaning, fees for licenses, union dues, tools, equipment, etc.) <i>Ask for our list of Un-reimbursed Employee Expenses, if applicable</i>