

## **Income Tax Checklist**

**New clients only: Please bring a copy of last year's tax return**

### **Personal Information**

- Driver's License
- Social Security cards for everyone on tax return
- Date of birth for everyone on tax return
- Proof of Residence for all Children on tax return

### **Income Forms**

- W2's
- 1099-R Retirement and Pension
- 1099-SSA Social Security Income
- 1099-INT Interest Income
- 1099-DIV Dividend Income
- 1099-G Unemployment or State Income Tax Refund
- 1099-MISC Self Employment Income
- W2-G Gambling Winnings
- 1099- C Cancellation Of Debt
- 1099-SA Distributions from HAS
- Alimony Paid or Received
- Rental Income and Expenses

### **Personal Deductions**

- Childcare Expenses, Including Address and Federal ID Number
- Medical Expenses
- Charitable Donations
- Mortgage Interest
- Real Estate/Personal Property Receipt
- State and Local Sales Tax Paid
- Education Expenses (1098-T)
- Estimated Tax Payments
- Gambling Loses

**Every tax return is unique. Some of the things listed may not apply to you or you may have items not listed on this checklist.**