**Tax Information Checklist**

This is a list of the most common items we’ll need to finish your returns. We’ll call or email you if we need anything else. You don’t need to return this page to us unless you add notes you want us to see.

Print the organizer on one sided paper only. This way we can properly scan your documents. Apple users must print the organizer in Adobe Reader not in PDFview.

If you are sending an email attachment, we can accept it. We would like to limit opening zip files for security reasons. If you are sending an email with an attachment, please notify us of that by a separate email. With the spread of viruses by email, we strive to be extra cautious in our practice.

We will send you an acknowledgement of receipt of your email.

\_\_\_\_ Signed Annual Engagement Letter **(Mandatory)**

\_\_\_\_ Completed Taxpayer Questionnaire **(Not Mandatory but highly Encouraged)**

\_\_\_\_ All return packets or mailing labels sent to you by the various taxing agencies

\_\_\_\_ All W-2’s

\_\_\_\_ All 1099 forms received confirming income from interest, dividends, retirement, social security,

Disability, unemployment, gambling winnings, cancellation of debt, credit and debit card

Transactions, etc.

\_\_\_\_ All 1094 and 1095 forms related to health care transactions

\_\_\_\_ All income tax information for children if you want us to prepare any required returns

\_\_\_\_ Year-end statement of mortgage interest (Form 1098), escrow activity and balance on mortgage

Or home equity loans and real estate taxes paid

\_\_\_\_ Total of charitable contributions and details for any non-cash contributions over $500 (Donee

Organization, address, date of contribution and fair market value at time of contribution). **All**

**Contributions must have receipts.**

\_\_\_\_ Copies of all LLC, Partnership or S-Corporation K-1’s (send separately later if everything else is

Ready and let us know when it’s coming)

\_\_\_\_ If you bought, sold or refinanced real estate, we need the multi-page HUD closing statement

For each transaction

\_\_\_\_ If you sold any shares of mutual funds and basis information is not provided by the broker, detail

All activity in the funds sold from original purchase date through date of sale (year-end summary

Statements are ideal)

\_\_\_\_ If you are claiming auto mileage as a deduction for business, rental properties or unreimbursed

Employee expenses, we need to know: total miles, commuting miles and business miles for the

Year

\_\_\_\_ If you lease your car and are deducting actual expenses, please also provide: original value of

Car (what you could have bought it for) and date of lease, and all expenses for lease payments,

Gas, car washes, licenses, insurance, tires, repairs, etc.

\_\_\_\_ Copies of any federal, state or local tax correspondence received

\_\_\_\_ The **dates** and **amounts paid** for all estimated tax payments (federal, state & local) for the tax

Year and the amounts of all refunds or rebates received

\_\_\_\_ All legal documents for formation, sale or purchase of a business during the year

\_\_\_\_ All legal documents for divorce decrees & alimony paid

\_\_\_\_ Voided check for account where refunds should be direct deposited or withdrawn (optional)

\_\_\_\_ All gambling income and loss records

\_\_\_\_ **New clients**: copies of prior year federal, state and local returns and depreciation schedules