

THINGS TO PREPARE BEFORE YOUR TAX PREPARATION APPOINTMENT

To make things simpler, we've put together a checklist to help you prepare for your tax preparation appointment. You may not need every item we have listed so pick the ones that apply to your tax situation. You can always print this list and check items off the list as you receive them.

PERSONAL IDENTIFICATION

- ☐ Valid Picture ID
- ☐ Social Security Cards (for you, your spouse, and your dependents)
- ☐ A copy of prior year's federal & state tax returns (if you have a copy)
- ☐ Birthdates for all persons listed on return
- ☐ Voided Check, Bank Statement, or Bank Routing & Account Number to Direct Deposit Refund

EMPLOYMENT & INCOME DATA

- | | |
|---|---|
| <input type="checkbox"/> W2's | <input type="checkbox"/> Unemployment Compensation |
| <input type="checkbox"/> 1099-MISC (Miscellaneous Income) | <input type="checkbox"/> Rental Income |
| <input type="checkbox"/> Interest Statements | <input type="checkbox"/> Gambling or Lottery Winnings |
| <input type="checkbox"/> Pension Income | <input type="checkbox"/> Stocks and Bonds |
| <input type="checkbox"/> Social Security Benefits | <input type="checkbox"/> Scholarship and Fellowship |
| <input type="checkbox"/> Alimony | <input type="checkbox"/> Conversion of IRA to Roth |
| <input type="checkbox"/> Dividends | <input type="checkbox"/> Unreported Tips |
| <input type="checkbox"/> Canceled Debt | |

PERSONAL EXPENSES

- | | |
|---|--|
| <input type="checkbox"/> Real Estate Taxes | <input type="checkbox"/> Tithes and Offering |
| <input type="checkbox"/> Mortgage Interest (1098) | <input type="checkbox"/> Unreimbursed Employee |
| <input type="checkbox"/> Business Expenses | <input type="checkbox"/> Charitable Contributions |
| <input type="checkbox"/> Moving Expenses | <input type="checkbox"/> Education Expense (1098-T) |
| <input type="checkbox"/> Student Loan Interest | <input type="checkbox"/> Alimony Health Insurance (Self Employed Only) |

