

TAX PREPARATION CHECK LIST

New Clients

- Names, dates of birth, and Social Security numbers for you, your spouse and dependents.
- Copy of the prior year's return

Personal Information Update

- Change of address, email address or phone number
- New dependent Social Security number and date of birth (and adoption costs if applicable)
- Change of marital status
- IRS PIN if one was mailed to you
- If divorced, date of birth and Social Security number for any dependents you are entitled to deduct this year
- Foreign bank account information

Income Information

- W-2 Forms for you and your spouse
- All 1099s received
- Alimony received
- Business or farm income and expenses and capital purchases
- Rental property income and expenses
- Installment sale information
- Miscellaneous income

Adjustments to Income

- Student loan interest (1098-E)
- Tuition paid (1098-T)
- IRA contributions
- Self-employed pension plan information
- Energy efficient home improvements
- Medical Savings Account contributions
- Health insurance payments and/or Form 1095-A

Itemized Deductions

- Child care costs with provider's name, address, ID number and amount paid during year
- Home purchase information - provide HUD settlement statement
- Mortgage interest
- Investment interest expense
- Charitable donations
- Medical and dental expenses (including health insurance premiums)
- Casualty and theft loss

Taxes Paid

- State and Local income taxes including quarterly estimated tax payments – dates and amounts
- Real estate taxes or personal property taxes