

Tax Appointment Checklist

The following Tax Appointment Checklist is a tool to help you gather the needed information for preparing your tax returns.

Event	Documents or Information Needed	Event	Documents or Information Needed
1 IRS or state communications	<ul style="list-style-type: none"> Letters, additional taxes paid, changes in prior-year returns, installment agreements or offers in compromise 	11 Estimated Tax	<ul style="list-style-type: none"> Date and amount of each payment to IRS and state
2 Married, Divorced or Separated during the year	<ul style="list-style-type: none"> Married - prior year return of both spouses Divorced - finalized date, copy of divorce decree Separated - copy of the separate maintenance agreement Community property income allocation 	12 Inheritance	<ul style="list-style-type: none"> K-1 from the estate Basis information
3 Birth or adoption of a child	<ul style="list-style-type: none"> Social Security card Date of Birth 	13 Started or terminated a small business	<ul style="list-style-type: none"> Formation or termination dates Property contributions or distributions K-1s if applicable
4 Death of spouse or child	<ul style="list-style-type: none"> Date of Death 	Business income/expenses	<ul style="list-style-type: none"> 1099 Miscellaneous 1099-Ks received for use of credit cards Beginning & ending inventory numbers, if applicable Mileage information
5 Additional members of household	<ul style="list-style-type: none"> Date of occupancy and relationship 	14 Lawsuit settlements	<ul style="list-style-type: none"> Date Received Reason for the settlement 1099-MISC
6 Unemployment	<ul style="list-style-type: none"> Unemployment form 	15 Rental Property	<ul style="list-style-type: none"> Income Expenses If new property purchased, closing documents
7 IRA contribution	<ul style="list-style-type: none"> Type of plan-SEP or IRA Amount of contribution & dates 	16 Prizes	<ul style="list-style-type: none"> Form 1099-MISC Value of prizes not included on Form 1099-MISC
8 Retirement distributions	<ul style="list-style-type: none"> Form 1099-R Rollovers RMD information if 70 1/2 or older Dates of distribution if reached 59 1/2 during tax year 	17 Lottery or gambling winnings	<ul style="list-style-type: none"> Total amount won whether on W-2G or not Total amount of losses
9 Social Security benefits	<ul style="list-style-type: none"> Form 1099-SSA 		
10 Sale of stocks, bonds, etc. (including mergers)	<ul style="list-style-type: none"> Form 1099-B or other sale documents Basis or original cost 		

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18	Health insurance, medical, dental or drug expenses	<ul style="list-style-type: none"> Health insurance premiums paid personally Health savings account (HSA) info-1099 SA Total of other medical, dental, and drug out-of-pocket expenses Long-term care premiums paid 	21	Job-related expenses	<ul style="list-style-type: none"> Meals, lodging and misc. expense amounts for items related to employment 	
	Medical Miles	<ul style="list-style-type: none"> Total medical miles driven January - December 		Business miles	<ul style="list-style-type: none"> Total miles driven AND Business miles driven per vehicle: January - December 	
	Health insurance verification	<ul style="list-style-type: none"> If health insurance is purchased in the marketplace, we will need Form 1095-A. Otherwise, furnish 1095 B & C when available 	22	Education expenses	<ul style="list-style-type: none"> Form 1098-T for parents or children; if the child is a student, the form will come to the child. Actual expense record to verify expenses for credit/deduction purposes Financial transcript from school needed to show when actual expenses were paid 	
19	Purchase or sale of personal residence or other real estate	<ul style="list-style-type: none"> Purchase documents, closing papers 		Student loan interest	<ul style="list-style-type: none"> Interest record for student loans Form 1098-E 	
	State taxes income, property taxes paid, sales tax paid on vehicles, motorcycles, or homes	<ul style="list-style-type: none"> Prior year's tax return (if not prepared by us) Property tax bills Closing papers from the purchase or sale of property 		23	Child or disabled spouse care	<ul style="list-style-type: none"> Name, address and ID number of the day-care provider Amount paid to the provider (if the provider comes into your home, a W-2 may be required)
	Refinance a home	<ul style="list-style-type: none"> Closing papers with amount borrowed Form 1098 Description of how proceeds were used 			24	Debt forgiveness or abandonment of property
Recapture/repayment of 2008 credit	<ul style="list-style-type: none"> Sale or change in use Record of amount repaid. 	25		Bankruptcy filing		<ul style="list-style-type: none"> Date filed Bankruptcy papers to show property rejected / returned by court
20	Charitable		<ul style="list-style-type: none"> Date, amount and name of organization Receipts for donations greater than \$250 Form 1098-C for vehicle or boat donations 	27	Foreign investments or holdings	<ul style="list-style-type: none"> Any foreign accounts? Any greater than \$10,000? Foreign business interest or stock of \$50,000 or more? Signature authority over foreign accounts?
	Non-Cash		<ul style="list-style-type: none"> List of items donated, fair market value and condition of goods. Salvation Army guide available from our office. 		28	A warm smile and
	Charitable miles	<ul style="list-style-type: none"> Mileage log for total charitable miles driven 				