

Tax Deduction Check List

Tax Preparation Checklist for Individuals

We are ethically bound to help you pay the lowest tax you are legally required to pay. This list will help us do our job. It is a concise, though not exhaustive, outline of some of the documents we will need when we meet with you.

- Last year's copy of your Federal and State tax returns.
- All statements of income, such as: W-2's
- Interest and Dividend statements (Form 1099)
- Pension income amounts including Social Security
- Individual Retirement Account contributions or withdrawals
- Unemployment income statements
- Trust, "S" corporation, and/or Partnership income amounts (Form K-1)
- Amounts of mortgage interest and points paid (Form 1098), real estate
- Auto excise taxes paid, charitable donations (both cash and non-cash), and "out-of-pocket" medical expenses
- Records of child care expenses including amounts and payee
- Lists of any job related expenses, such as:
 - Moving expenses (if your move was job related)
 - Tools and other equipment such as computers, etc.
 - Safety clothing and uniforms
 - Professional books, journals, dues, union dues, etc.
- Amounts of any estimated tax payments
- Details of any capital gains transactions
- If you own rental property or a small business, we will need to see the records pertaining to the property or business