TAX CLIENT CHECKLIST

Please check what information you have, mark how many forms of each, and if you are waiting for more.

*Notes: Deposit required for all services. Everyone must fill new Organizer.

- ❑ Last year's tax return (unless we prepared)
  - ❑ Drivers' licenses (Taxpayer & Spouse; to add to file) Photo ID: Passport, Military (Dates in & out of USA)
  - ❑ Social Security cards (each person on return; to add to file)
  - ❑ Dates of Birth (each person on return; to add to file)
- ❑ Do you have a business? … IRS Notices? … IRS payment receipts?
- ❑ Voided check for direct deposit
- ❑ W-2's - Wage & Earning Statements
- ❑ 1099's - Interest, dividends, retirement, miscellaneous
- ❑ 1098's - Mortgage Interest Statement
- ❑ Property tax forms
- ❑ Charitable contributions/Donations
- ❑ Settlement statement for house purchased
- ❑ Settlement statement for house sold
- ❑ 401K or IRA statements
- ❑ Statements from stock or mutual fund investments, date of purchase, & cost
- ❑ Moving expenses (from out of town)
- ❑ Alimony (Paid or received)
- ❑ Partnerships (K-1)
- ❑ Gambling & Lottery winnings
- ❑ Education (Educator expenses, tuition, and/or student loan interest)
- ❑ Childcare
- ❑ Unemployment compensation
- ❑ Social Security Benefits
- ❑ Proof of Health Insurance
- ❑ Any other papers that you have a question about or that relates to this year's tax return. You may list out-of-pocket expense totals and any tax questions on separate sheets of paper.