

QUALITY TAX & BUSINESS PARTNERS

Putting the Financial Pieces of Your Life Together

TAX PREPARATION CHECKLIST...WHAT YOU'LL NEED

NEW CLIENTS ONLY

- ☐ Name and Social Security # for Taxpayer (and Spouse if applicable)
- ☐ Birth dates for every person on the return
- ☐ Copy of last year's tax return
- ☐ Name & Social Security # of Dependents on return



INCOME

- ☐ W-2 forms from your employer(s)
- ☐ Interest (Form 1099-INT) from your bank/credit union
- ☐ Dividend Income (Form 1099-DIV)
- ☐ Last Year's State Refund Amount
- ☐ Unemployment Income (Form 1099G)
- ☐ Rental Income
- ☐ Sale of Any Business Assets
- ☐ Stock Sales (Form 1099-B/Broker Statement) and cost basis
- ☐ Pension/Retirement Income (Form 1099-R)
- ☐ Gambling or Lottery Winnings (W-2G or not)
- ☐ Social Security/Railroad Ret. (SSA-1099/RRB-1099)
- ☐ Self-Employed/Hobby Income (may have 1099-MISC)
- ☐ Income from Partnerships, S Corps (Schedule K-1)
- ☐ Alimony Received (also need ex-spouse's name)
- ☐ Cancellation of Debt (Form 1099-C)
- ☐ Prizes and Awards

DEDUCTIONS

- ☐ Medical & Dental Expenses
- ☐ Mortgage Interest/Points/PMI (Form 1098)
- ☐ Property Taxes (Amt. PAID in 2013)
- ☐ Automobile Excise Tax
- ☐ Unreimbursed Employment Related Expenses

TAX PREPARATION CHECKLIST...WHAT YOU'LL NEED

DEDUCTIONS (cont'd)

- ☐ Gambling Losses
- ☐ Casualty and Theft Losses
- ☐ Cash & Non-Cash Charitable Donations (must have receipts)
- ☐ Miles Driven for Charity
- ☐ Job Search Expenses
- ☐ Moving Expenses
- ☐ Office in Home Use Deductions (if applicable)



ADJUSTMENTS & CREDITS

- ☐ Adoption Expenses
- ☐ Amt. Paid to Educational Institution (Form 1098-T if received)
- ☐ Traditional IRA Contribution
- ☐ Student Loan Interest Paid
- ☐ Child Care Provider Name/Address/SS# (or EIN) & Amt. Pd.
- ☐ Educator Expenses (for teachers)
- ☐ Foreign Taxes Paid
- ☐ Federal Estimated Taxes Paid

OTHER MISC. INFO

- ☐ Form 8332 or copy of divorce agreement proving your right to claim a child living with your ex-spouse
- ☐ If claiming Earned Income Credit (EIC) – we may need proof of support
- ☐ Most recent Investment Statements
- ☐ Direct Deposit Info (routing and account number) if applicable