

Tax Preparation List

Basic Information:

- Social Security Number (including your spouse and any dependents)
- Date of Birth (including your spouse and any dependents)
- W-2 Forms
- 1099-C forms for Cancellation of Debt
- 1099-R forms for Retirement Plans
- 1099-INT, -DIV, -B, or K-1s for investment or interest income
- SSA-1099 for Social Security Benefits Received
- 1099-G forms for Unemployment income, or state/local tax refunds
- 1099-S forms for sale of property
- Rental Property Income
- Miscellaneous Income (i.e. gambling winnings, scholarships etc.)
- Moving Expenses
- 1098 Forms for student loan interest paid
- 1098-T for tuition paid
- Alimony paid or received
- Health Insurance payment records

Additional Information :

- Child Care Expenses
- Education Expenses
- Adoption Costs
- Mortgage Interest
- Investment interest expenses
- Medical & Dental Expenses
- Charitable Donations
- Real estate taxes paid
- Personal Property taxes
- Business Expenses
- Union Dues
- Rental Property Expenses
- Estimated Tax payments made throughout the year
- Self-Employed pension plans