FINANCIAL CPA
CERTIFIED PUBLIC ACCOUNTANTS
Serving Clients for 22+ Years

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TAX CHECKLIST FOR PERSONAL TAX RETURNS

For us to prepare your return more efficiently, please provide us with the following information:

INCOME ITEMS

- W-2 Salaries paid to you by your employer.
- 1099-B Sales of stocks & bonds. (*)
- 1099-DIV Dividends Earned.
- 1099-G Unemployment Compensation and/or State or local refund.
- 1099-INT Interest income earned and **1099-MISC** Freelance work earnings.
- l099-R Distributions from IRAs, pensions, and annuities.
- K-1 Earnings from S-Corps, Partnerships, Estates, & Trusts.

(*)For each sale listed on the 1099-B, please provide the related purchase information, including the amount and date acquired.

EXPENSE/DEDUCTION ITEMS

- 1098 Mortgage Interest paid, Points paid
- Real Estate taxes paid, and dates they were paid.
- **Contributions or donations** made to charity, cash and/or clothing, etc. If you donate more than $250 to a particular charity, you must retain a statement from the charity.
- Unreimbursed medical expenses and unreimbursed employee expenses.

OTHER ITEMS

- If this is the first year we are preparing your tax return, please provide us with a **copy of your last year's tax return**.
- Any new dependents this year? If so, please provide your full name, date of birth, and social security number.
- If you want your refund electronically deposited to your bank account, **provide your bank routing and account number**. You can find these numbers at the bottom of your personal check, or you can just send us a voided check.
- Your contact information is **phone and email**.
- Date of birth for you, your spouse, and your dependents.