CLIENT CHECKLIST

Checklist of Information Needed for Individual Income Tax Returns

1. Name, Social Security number, and birth date of all dependents.
2. W-2's
3. Forms 1099 for interest and dividends including brokerage accounts.
4. For all sales of securities (stock, bonds, mutual funds, etc.), the date purchased and the amount paid for each security.
5. Medical expenses paid out-of-pocket
    1. Insurance premiums
    2. Long term care insurance premiums
    3. Doctors, dentists
    4. Lab and diagnostic fees
    5. Hospital fees
    6. Medication, both prescription and over the counter
    7. Eyeglasses
    8. Hearing aids
    9. Other
6. Property taxes paid, summarized by location.
7. Forms 1098 for mortgage interest paid.
8. Investment interest paid.
9. Charitable contributions made including cash and goods (clothing donated).
10. Investment fees.
11. Legal and accounting fees paid in connection with financial matters.
12. Partnership K-1's.
13. Rental property income and expense in summary format.
14. Estimated income taxes paid.
15. Business income and expense (Schedule C) in summary format.
16. Retirement plan contributions made or to be made (IRA, Roth IRA, SEP, Simple IRA, etc.)
17. Closing documents from purchase or sale or property including primary residence, second residence, rental property.
18. Miscellaneous and other income, including Forms 1099-Misc.

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