STANDARD 1040 REQUIREMENTS (IF APPLICABLE)

Form & Information Checklist

1. Address to use on face of Federal and State Tax Returns.

2. Address for mailing to you the package containing finalized Federal and State Tax Returns.

3. Contact home, office, and mobile phone numbers for taxpayer and spouse. Primary and secondary e-mail addresses for taxpayer and spouse.

4. Full names of taxpayer, spouse, and dependents. Social security number(s), birth dates, and occupations of all individuals where applicable.

5. Prior year Tax Returns.

6. W-2s (Wage & Tax Statements), contract wages (1099s), and cash receipts for services.

7. 1099-G (State Refund Statement).

8. 1099-INT (Interest Income).

9. 1099-DIV (Dividends Income).

10. Earnings from partnerships, corporations (via K-1s), and/or estates or trusts.

11. 1099-B (Capital Gain Income, include cost basis and purchase dates with the information).

12. Investment management fees.

STANDARD 1040 REQUIREMENTS (IF APPLICABLE)

13. 1099-OID (Original Issue Discount).

14. 1099-R (Distributions from Pensions, Annuities and Retirement Accounts).

15. 1099-MISC (Non-employee compensation or Miscellaneous income).

16. SSA-1099 (Social Security Benefits).

17. Unemployment Compensation.

18. Self-Employment Income & Expenses; (See Self-Employment Checklist for more details.)

19. Moving Expenses; (See Moving Expenses Checklist for more details.)

20. Home Office Expense; (See Home office Checklist for more details.)

21. Rental Real Estate income and Expenses.

22. Royalty Income.

23. Schedule K-1's (Partner or Shareholders Share of Income from Partnerships, LLC's, S-Corporations, Trusts).

24. Date & Amount of Traditional, Roth or Non-deductible IRA contributions.

25. 1098-E (Student Loan Interest).

26. Alimony Paid or Received.

STANDARD 1040 REQUIREMENTS (IF APPLICABLE)

27. Household Employment.

28. Quarterly Federal and State Estimated Tax Payments paid for the current tax year.

29. Medical and Dental Expenses.

30. 1098 (Mortgage Interest Statement).

31. Real Estate Taxes.

32. Automobile License Fees (Deductibility varies by state).

33. Investment Interest Expense.

34. Charitable Contributions (Cash or Noncash Receipts); (See Cash and Noncash Charitable Contributions Checklist for more details.)

35. Tax Preparation Fees.

36. Unreimbursed Employee Business Expense (See Business expense Checklist for more details.)

37. Other Expenses (i.e. investment, safe deposit box etc…)

38. Direct Deposit of Refund Request (Bank name, Account #, Routing #).