

## Individual Tax Checklist

**Please remember to bring the following documents and information with you when you drop off your tax return:**

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### **General Information**

Name  
Current Address  
Social Security Number  
Date of Birth  
List of Dependents (including SSN & DOB)  
Voided Check (optional for direct deposit)  
Prior Year Tax Return (new clients only)

### **Income**

W-2's  
1099's  
1099-R's (Pension and IRA Distribution Statements)  
Interest Income Statements  
Dividend Income Statements  
Unemployment Compensation  
Social Security  
Alimony Received  
Gambling Winnings  
Other income

### **Expenses/Deductions**

Medical/Dental Expenses  
Real Estate Taxes  
Automobile Taxes  
Home Mortgage Interest & Points  
Donations/Tithes  
Deductible Job Expenses  
Casualty & Theft Losses  
Other Expenses/Deductions

### **Small Businesses/Farming/Rental Activities**

Sales  
1099 Income  
Other Income Figures  
Equipment Purchases & Related Information  
Purchases/Merchandise  
Advertising  
Car and Truck Expenses/Mileage Figures  
Insurance  
Loan Interest  
Office Expense  
Rent  
Repairs & Maintenance  
Supplies  
Shipping/Freight/Postage

Taxes & Licenses  
Travel  
Meals & Entertainment  
Utilities  
Telephone  
Contract Labor  
Wages  
Hay & Feed  
Seeds  
Fertilizer  
Vet Bills  
Chemicals  
Gas, Fuel, & Oil  
Commissions  
Legal & Accounting  
Other Expense Figures

**Other Information**

IRA Contributions  
Student Loan Interest  
Amount of Business Miles  
Tuition Payments  
Estimated Tax Payments  
Stock Transactions  
Home Office Deduction Information