

# Taxpayer Checklist for Individuals

This is provided to help you by listing the most common items to consider when filing your personal tax return or organize your information for us to prepare your return.

General Information	Itemized Deductions (Schedule A)
<ul style="list-style-type: none"> <li><input type="checkbox"/> Full name, Social Security Number for yourself, spouse , and dependents</li> <li><input type="checkbox"/> Date of Birth for yourself, spouse and dependents</li> <li><input type="checkbox"/> Voided Check (if electronic filing)</li> <li><input type="checkbox"/> Tax returns filed from the prior 3 years</li> <li><input type="checkbox"/> Payments of Estimated Federal, State, local taxes paid</li> <li><input type="checkbox"/> Presidential Election Fund Contributor Y/N</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Medical Expenses (Health Care – Prescriptions, Doctors, Medical Insurance, Long Term Health Care Insurance)</li> <li><input type="checkbox"/> Form 1098 – Mortgage Interest Expense</li> <li><input type="checkbox"/> Real Estate Taxes and other taxes paid</li> <li><input type="checkbox"/> List of Charitable Contributions</li> <li><input type="checkbox"/> Un-reimbursed Job Expense</li> <li><input type="checkbox"/> Union/Professional Dues, Job related educational costs, Investment expenses, Job Search Cost, Hobby expense, Work uniforms, safe deposit box, tax preparation fees.</li> </ul>

Income Information	Tax Credit & Deduction Information
<ul style="list-style-type: none"> <li><input type="checkbox"/> W-2s</li> <li><input type="checkbox"/> Form 1099 – Interest Income, Dividend Income, Retirement, Annuities, Tax refunds, Unemployment</li> <li><input type="checkbox"/> Social Security received</li> <li><input type="checkbox"/> Alimony received</li> <li><input type="checkbox"/> Gambling income and losses</li> <li><input type="checkbox"/> Cost basis of Securities sold</li> <li><input type="checkbox"/> Rental Property Income (see “Rental worksheet’ on Resources page of our website)</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Child Care Expenses</li> <li><input type="checkbox"/> Form 1098-T Education Tuition Expense</li> <li><input type="checkbox"/> Interest Paid on Student Loans</li> <li><input type="checkbox"/> Alimony Paid (need Social Security number of recipient)</li> <li><input type="checkbox"/> Medical savings account</li> <li><input type="checkbox"/> Moving Expenses (see “Ten helpful Tax Tips’ on Resources page of our website)</li> <li><input type="checkbox"/> IRA Contributions</li> <li><input type="checkbox"/> Rental Property Expense &amp; Cost Basis (see “Rental worksheet’ on Resources page of our website)</li> <li><input type="checkbox"/> Adoption Expenses</li> </ul>