



Appt Date/Time: \_\_\_\_\_  
 Book Appt online @ YourAccountantsOffice.com  
 click the RED "Appointment" button on the Right

## Individual Tax Return Checklist

Please gather the following information for your Taxes

480-331-3316

- | Included | N/A   |   |
|----------|-------|---|
| _____    | _____ | Copy of prior year tax return (if new client)   |
| _____    | _____ | IRS Notices   |
| _____    | _____ | Debt Relief, credit card balances written off, foreclosure, bankruptcy                        |
| _____    | _____ | W-2 (from each employer you had during the year)  |
| _____    | _____ | Interest & Dividend's (1099-INT or 1099-DIV)  |
| _____    | _____ | Pension income or Retirement Plan Distributions (1099-R)                                      |
| _____    | _____ | Social Security benefits (1099-S)   |
| _____    | _____ | Unemployment compensation, state tax refunds, gambling/lottery winnings (1099-G)              |
| _____    | _____ | Independent contractor (1099-MISC)  |
| _____    | _____ | Sale of Mutual Funds / Stock (1099-B) or Sale of Real Estate (1099-S)                         |
| _____    | _____ | K-1 from parternships, s-corp, trusts & estates   |
| _____    | _____ | Alimony paid or received (incl. SSN of recipient - save cancelled checks)                     |
| _____    | _____ | Purchase or sale of personal residence (incl. settlement statement & home improvement costs)  |
| _____    | _____ | Moving expenses (if moved for work)   |
| _____    | _____ | IRA contributions   |
| _____    | _____ | Child care expenses   |
| _____    | _____ | Payments from Qualified Education Programs (1099-Q)   |
| _____    | _____ | Tuition or higher education fees (1098-T)   |
| _____    | _____ | Distributions ~ HSA or MSA (1000-MS)  |
| _____    | _____ | Casualty losses (from fire, theft or natural disaster)  |
| _____    | _____ | Medical, Dental, Chiropractor, Psychologist, (not life/business coach), Prescription expenses |
| _____    | _____ | Mortgage or home equity loan interest paid (1098)   |
| _____    | _____ | Real estate taxes paid  |
| _____    | _____ | Auto registration (tags)  |
| _____    | _____ | Estimated federal, state & local taxes paid   |
| _____    | _____ | Charitable contributions (cash, donated property - if exceeds \$500; need itemized list)      |

### Small Business on a Schedule C ~

#### Business Expenses

**\*\* We do NOT need receipts, just TOTALS \*\***

Phone	Networking / Dues	Computer expenses	Office supplies
Insurance	Postage	Assistant help	New Computer, fax, phone, desks
Travel	Meals & Entertainment	Advertising / Expos	Mileage log

#### Home Office:

Rent/Mortgage	HOA dues	Security	Exterminator
Electric/Utilities	RE Taxes	Maintenance/repairs	Landscaping
Water/Gas/etc.	Homeowners Ins.	Sq. Ft. of office/ Sq. Ft. whole house	Internet