



## TAX PREPARATION INTERVIEW AID LIST

This list should help you collect and report the information need to prepare your 2012 income tax return. Please include any additional document or information not listed in this list.

**Taximum Engagement Letter**

**Client data Sheet**

**Wage statements/ W-2s**

Self-employment business income and expenses/1099-MISC

Commissions received/paid

Pension, retirement income/ 1099-R

Unemployment income/1099-G

Cancelled Debt Amount/1099-C

Social Security income / SSA-1099

IRA Contributions

Statements on the sales of stocks or bonds/ 1099-B

Interest and dividend income/1099-INT/1099-DIV

Lottery or gambling winning/losses

State refund amount/1099-G

Income and expenses from rentals

Alimony paid or received

Record of purchase or sale of residence

Medical and dental expenses

Real estate and personal property taxes

State or local taxes paid

Estimated taxes of foreign taxes paid

Cash and non-cash charitable donations

Mortgage or home equity loan interest paid/1098

Unreimbursed employment-related expenses

Job-related educational expenses

Educator expenses

Tuition and Education Fees/1098-T

Student loan interest / 1098-E

Casualty or theft losses

Child care expenses and provider information

Social Security Cards

Driver's License(s)

Dependant's Social Security numbers and dates of birth

Information concerning your stimulus payment checks

Last year's Federal and State tax return

Other

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