



TAX INTERVIEW CHECKLIST

Before preparation of your tax return you should use this checklist to help you get organized.

PERSONAL INFORMATION

- Taxpayer Social Security card
- Spouse Social Security card
- Social Security cards for any dependents
- Taxpayer valid ID (Driver's License)
- Bank information or voided check for refund direct deposit
- Copy of last year's tax return (new clients only)

INCOME INFORMATION

- Wage statements/ W-2s
- Self-employment business income and expenses/1099-MISC
- Unemployment income/1099-G
- Commissions received/paid
- Pension, retirement income/ 1099-R
- 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
- Rental property income and expenses
- Alimony received
- Record of sale of residence

INCOME ADJUSTMENTS

- Real estate and personal property taxes
- State or local taxes paid
- Estimated taxes of foreign taxes paid
- Cash and non-cash charitable donations
- Job-related educational expenses
- For teachers: Educator expenses
- Tuition and Education Fees/1098-T
- Student loan interest / 1098-E
- Self-employed health insurance payment records
- Moving expenses
- Alimony paid

CREDITS AND DEDUCTIONS

- Child care expenses and provider information
- Education cost: Form 1098-T, education expenses
- Adoption costs
- Mortgage or home equity loan interest paid/1098
- Medical and dental expenses
- Casualty or theft losses
- Unreimbursed employment-related expenses (uniform, supplies, travel, etc)
- Home Business/Office expenses
- Rental property expenses
- Record of purchase of residence