



TAX and BUSINESS PARTNERS

Tax Preparation Checklist

- Name and Social Security # for Taxpayer (and Spouse if applicable)
- Birth dates for every person on the return
- Copy of last year's tax return
- Name & Social Security # of Dependents on return

Income

- W-2 forms from your employer(s)
- Interest (Form 1099-INT) from your bank/credit union
- Dividend Income (Form 1099-DIV)
- Last Year's State Refund Amount
- Unemployment Income (Form 1099G)
- Rental Income
- Sale of Any Business Assets
- Stock Sales (Form 1099-B/Broker Statement) and cost basis
- Pension/Retirement Income (Form 1099-R)
- Gambling or Lottery Winnings (W-2G or not)
- Social Security/Railroad Ret. (SSA-1099/RRB-1099)
- Self-Employed/Hobby Income (may have 1099-MISC)
- Income from Partnerships, S Corps (Schedule K-1)
- Alimony Received (also need ex-spouse's name)
- Cancellation of Debt (Form 1099-C)
- Prizes and Awards

Deductions

- Medical & Dental Expenses
- Mortgage Interest/Points/PMI (Form 1098)
- Property Taxes (Amt. PAID in 2013)
- Automobile Excise Tax
- Unreimbursed Employment Related Expenses
- Gambling Losses
- Casualty and Theft Losses
- Cash & Non-Cash Charitable Donations (must have receipts)
- Miles Driven for Charity
- Job Search Expenses
- Moving Expenses
- Office in Home Use Deductions (if applicable)

Adjustments & Credits

- Adoption Expenses
- Amt. Paid to Educational Institution (Form 1098-T if received)
- Traditional IRA Contribution
- Student Loan Interest Paid
- Child Care Provider Name/Address/SS# (or EIN) & amt. Pd.
- Educator Expenses (for teachers)
- Foreign Taxes Paid
- Federal Estimated Taxes Paid