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Tax Preparation Specialists

Please Bring the Following to Your Tax Appointment

_____ All W2s for wages, K1 forms for partnerships, Subchapter S Corp.

_____ 1099s for interest and dividends earned

_____ Amount of last year's Federal Refund

_____ Amount of last year's State refund

_____ Any alimony received/alimony paid

_____ Any sales of stocks or bonds, include dates and prices when bought/dates and prices when sold, including a copy of the 1099-B

_____ Sale/purchase of your personal residence – include settlement statement

_____ Any pensions, annuities, or IRA distributions

_____ Social Security received, including the SSA statement

_____ Any rental, royalty or other income and appropriate expenses

_____ Any unemployment income

_____ Any job-related expenses incurred on your job for which you did not receive any reimbursement. Note: For an educational expense to qualify, it must be required by your employer

_____ If you are paying for education for yourself or a family member; include name of institution, amount paid for tuition and fees only, and for whom paid

_____ Any contribution made – please circle the plan:

Keogh IRA ROTH IRA SEP

_____ Any disability income

_____ Any penalty for early withdrawal on savings or CD

_____ Any other income received

_____ State estimated payments paid for the tax year

_____ Federal estimated payments paid for the tax year

_____ Sales tax paid on large items

Please Bring The Following to Your Tax Appointment (cont.)

- _____ **Total paid and not reimbursed for all medical services**
- _____ **After tax medical insurance payments made, including long term care**
- _____ **State and local income taxes paid for previous year**
- _____ **Real estate taxes for all properties actually paid this year**
- _____ **Amount paid for license plates for your vehicles**
- _____ **Interest paid to a financial institution for a home mortgage, home equity loan, or second home**
- _____ **Mortgage Insurance paid on any new or refinanced mortgage in 2007**
- _____ **Mortgage interest paid to an individual**
- _____ **Student loan interest paid**
- _____ **Cash or check contributions - you must have a receipt for all contributions.
List separately any organization to which you gave more than \$3000**
- _____ **Non-cash contributions including food, clothing, old books, paper, mileage
driven for organizations – you must have an itemized receipt**
- _____ **Union and professional dues paid**
- _____ **Tax preparation fees paid in this year**
- _____ **Investment consultation fees paid in this year**
- _____ **Any energy saving improvements to your home this year**
- _____ **Safe deposit box fee**
- _____ **Purchase of a new hybrid car**
- _____ **Any change in marital status**
- _____ **Any new children in the household or whose support you pay. Date of birth and Social
Security number for all household members if not previously
provided**
- _____ **Any child care paid in this year. You must have the provider's Social Security number or Federal
ID number in order to claim the deduction, even if this was a payroll deduction**
- _____ **Any other information which you would like us to see or which you have questions about**
- _____ **Copy of last year's tax return if you are a new client**
- _____ **Copy of current pay stub as well as final pay stub for last year**