

## ITEMS YOU MIGHT BRING TO A TAX PREPARATION APPOINTMENT

Client tax organizer (if you use one)  
Copy of last year's tax returns (new clients only)  
W-2: wages 1099-R: pensions, annuities, IRA's, rollovers  
K-1: Partnership, S-corporation, trust reporting documents  
1099-INT: interest earned  
1099-DIV: dividends earned  
1099-B: stock sales & purchase dates and cost  
1099-G: unemployment compensation, state tax refund  
1099-SSA: Social Security benefit  
W-2G: lottery, gambling winnings  
Form 5498: annual report of IRA balances  
Federal and state estimates: date paid and amounts  
Name, address, ID, \$ paid to each child care provider  
1098: mortgage interest statement  
Closing statements for real estate bought and sold  
Closing statement for purchase of property sold this year  
Receipts for charitable contributions including non-cash  
Social security cards for new dependents & new clients  
Business/rental income & expense by category  
Any IRS or state correspondence received during year  
December 31st odometer reading for business auto  
Real estate taxes paid when not escrowed  
Personal property taxes paid for your auto, boat, RV, etc.  
Tax preparation fees paid (new clients only)  
Union dues paid  
Investment expenses paid  
College tuition and fees for you, spouse & dependents  
Educator expenses paid – necessary teacher's supplies  
IRA contributions made  
Health insurance costs (not pre-tax dollar)  
Doctors, dentists, hospital, nursing home costs paid  
Prescription medicines paid  
Eye-care costs paid  
Summary of miscellaneous medical expenses  
Medical mileage driven  
Charitable mileage driven  
Non-cash contributions to charitable organizations  
Utilities, insurance, and repairs if you have a home office  
Square footage of your home & office used for business

Description, cost and purchase date of business assets  
List of capital assets traded/sold/disposed of  
Meal and entertainment costs if for business purposes  
Copy of Profit and Loss statement for your business  
Copies of 1099-MISC issued to independent contractors  
Year-end payroll reports if you had employees  
Interest expense on business autos, or on equipment