

Information Needed to Prepare Your Tax Return

- ✓ All income information:
 - Forms W-2 received from employers
 - Forms 1099-R received for pension, IRA, and other retirement income
 - Forms 1099-MISC received for work or services performed, rents, royalties, etc.
 - Forms 1099-INT received for interest income
 - Forms 1099-DIV received for dividend income
 - Forms 1099-B received for stock and other asset sale income
 - Social security statement of income
 - For business or rental income, see below
 - An itemized list of any and all other income you and your spouse received
- ✓ Business income and expenses:
 - All 1099's (including 1099-MISC and 1099-K)
 - Other income not included on any form 1099
 - A list of expenses for the running of your business
 - Business mileage for your vehicle, PLUS total miles driven (including personal and commuting)
 - Office in home information, if applicable (call for more information)
- ✓ Rental Properties:
 - Type of property and physical address
 - Income from rent
 - A list of rental expenses (include any 1098)
 - A list of capital improvements made this year (such as furniture, appliances, etc)
- ✓ Dependents:
 - Full name, as shown on social security card (include a copy of SS card if possible)
 - Social security number
 - Date of birth
 - Relationship to you (child, parent, etc)
 - If this person attends daycare or college, please indicate
- ✓ Childcare:
 - Name and address of provider
 - Social security number or employer ID number of provider
 - Total paid to provider, broken down by child
- ✓ Adjustments to Income:
 - Student loan interest
 - Traditional IRA contributions
 - Educator out of pocket expenses
 - Moving expenses
- ✓ College costs (broken down by student, if multiple students):
 - Tuition (include form 1098-T)
 - Books
 - Supplies (computer, printer, etc)

- ✓ List of itemized deductions:
 - Medical (totals for):
 - Mileage (round trip) for doctor, dental, hospital, etc visits, purchase of prescriptions, medical equipment, etc.
 - Doctors, dentists, chiropractors, etc.
 - Prescription drugs
 - Eyeglasses, hearing aids, dentures, etc.
 - Medical equipment such as wheelchairs, canes, walkers, etc.
 - Hospital stays
 - Nursing home stays
 - Reimbursements from insurance companies
 - Any other medically necessary expenses (please explain
 - Taxes paid:
 - Real estate (on your home or land (please list farm, business or rental separately)
 - Personal property taxes (on cars, etc)
 - Sales taxes on large purchases (car, boat, motorhome, major home improvements)
 - Interest paid:
 - Mortgage Interest paid to banks, etc. (include form 1098 if possible)
 - Mortgage interest paid to individuals (include name, address and social security number of recipient)
 - Investment interest paid on stocks and other investments
 - Interest paid on a qualified second home (actual real estate or an RV, etc)
 - Contributions:
 - Cash/check contributions listed by charity
 - Non-cash contributions to charities such as Goodwill or Salvation Army (if you are claiming more than \$500 you must itemize them, call for more information)
 - Mileage driven to perform charitable acts (such as Habitat for Humanity, church fundraisers, etc)
 - Mileage driven to deliver non-cash contributions
 - Miscellaneous deductions:
 - Tax preparation fees (unless I prepared your prior year return)
 - Safe deposit box fees
 - Employee business expenses (call for more information)
 - IRA custodial fees
 - Union dues, professional fees, professional books & publications
- ✓ If you bought, sold or refinanced a home during 2012, include the settlement statements
- ✓ If you suffered a casualty loss, please call for more information. NOTE: Most casualty losses do not qualify for a deduction.
- ✓ Any other documents you think might pertain to your return, items you think might be deductible or questions you may have regarding your return.