

TAX PREPARATION CHECKLIST

Please make our job easier by bringing as many of these documents listed below as you can. This will help you get your refund faster.

<input type="checkbox"/> Dependents SSN and Dates of Birth	<input type="checkbox"/> Alimony Paid or Received
<input type="checkbox"/> Previous year's Federal and State Tax Return	<input type="checkbox"/> Child Care Expenses and Provider Information
<input type="checkbox"/> Wage Statement – Form W-2	<input type="checkbox"/> Medical, Eye Care and Dental Expenses – Form 1095 for medical insurance proof
<input type="checkbox"/> Pension or Retirement Income – 1099-R	<input type="checkbox"/> Cash and Non-cash Charitable Contributions
<input type="checkbox"/> Interest and Dividend Income – Form 1099-INT/Form 1099-DIV	<input type="checkbox"/> Record of Purchase or Sale of Real Residence
<input type="checkbox"/> State Income Tax Refund Amount – Form 1099-G	<input type="checkbox"/> Mortgage or Home Equity Loan Interest Paid-Form
<input type="checkbox"/> Social Security Income – Form SSA-1099-SM	<input type="checkbox"/> Real Estate and Personal Property Taxes
<input type="checkbox"/> Unemployment Income Form 1099-G	<input type="checkbox"/> Unreimbursed Employment related Expenses
<input type="checkbox"/> Commissions Received	<input type="checkbox"/> Job-related Educational Expenses
<input type="checkbox"/> Commissions Paid	<input type="checkbox"/> Educator Expenses
<input type="checkbox"/> Sales of Stocks or Bonds – Form 1099-B	<input type="checkbox"/> Tuition and Education Fees-Form 1099-T
<input type="checkbox"/> Self Employment Business/Farm Income and Expenses-Form 1099-MISC	<input type="checkbox"/> Student Loan Interest – Form 1098-E
<input type="checkbox"/> Lottery or Gambling Winnings – Form W-2G	<input type="checkbox"/> Casualty/Theft Losses
<input type="checkbox"/> Lottery or Gambling Losses	<input type="checkbox"/> Estimated Taxes
<input type="checkbox"/> Income and Expenses from Rentals and other businesses	<input type="checkbox"/> Foreign Taxes Paid
<input type="checkbox"/> Income from Partnerships, S-Corporation, Trusts and Estates – Sch. K-1	<input type="checkbox"/> Tithe & Offering
<input type="checkbox"/> IRA Contributions	<input type="checkbox"/> Current Motor Vehicle Tag Receipt

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