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To help you get ready for your tax return appointment, we have prepared the following Tax Return Check list of the most common income and deduction items taken on a Federal Form 1040 Income Tax Return.

Tax Return Check List

1. For New clients—a copy of last year's Federal & State forms as filed.
2. Full Name, Social Security number and date of Birth for Taxpayer(s)
3. Full Name, Social Security number and date of Birth and relationship for all Dependents.
4. W-2 forms from all employers.
5. Forms 1099-Int interest from banks, 1099-Div for Stock and mutual fund Dividends.
6. Forms 10099-B for stock or mutual fund sales from your brokerage.
7. Form 1099-R for Distributions from Pensions, IRA's or Annuities.
8. Any rental real estate, Forms K-1 from partnerships or S-corporations.
9. Unemployment Compensation.
10. Social Security Income.
11. W-2 Gambling winnings from casinos or lotteries.
12. Student Loan interest, penalty on early withdrawal of Savings or Alimony paid.
13. Medical Deduction- copays, prescriptions, glasses, etc. Mileage and or tolls and parking, medical insurance paid if not part of a pretax plan.
14. Form 1098- Mortgage Interest and Property taxes on Primary home and/or vacation home.
15. Listing of Charitable Contributions that you have receipts for. Non-cash contribution of items such as used clothing and or household goods.

16. Unreimbursed employee expenses such as: job travel, union dues, uniforms or special tools, licenses or education expenses.
17. Safety deposit box rental, investment publications.
18. Scheduled listing of gambling losses if you received form W-2G

The above is a general list, If you have items like the sale or purchase of your primary home, please call to get list of additional information that may be required.

For your convenience we accept the following credit cards.

