TAX INFORMATION CHECKLIST

INCOME ITEMS:

W-2 Forms:
- Husband _____
- Wife _____
- Additional Jobs _____

1099 INT -- Interest Earned ** _____
1099DIV -- Dividends Earned ** _____
1099R -- Pension Benefits/IRA Distribution _____
1099G -- State Tax Refund _____
1099B -- Sales of Stocks/Bonds (Include Stock Cost/Date of Purchase) ** _____
(Sales Price/Date of Sale) _____
1099MISC -- Miscellaneous Income _____
K-1 -- Partnership/S Corp/Trust Earnings _____
Schedule C -- Business Income/Expenses _____
(Expenses should be totaled by category)
Schedule E -- Rental Income/Expenses _____
(Expenses should be totaled by category)
Social Security Benefits/Unemployment/Other Misc. Income _____

INCOME ADJUSTMENTS/TAX CREDITS:

IRA, Roth IRA, SEP and/or SIMPLE Contributions _____
Schedule 2441 -- Child Care Expenses
(Total Per Child; Provider's Name, Address, & Federal ID) _____
(Dependent Care benefits included on W-2) _____
Qualified Tuition Payments _____
Teacher Classroom Expenses _____
HSA Contributions/Distributions _____

SCHEDULE A EXPENSE ITEMS:

Medical & Dental Expenses (Including Health Insurance Premiums) _____
Mortgage Interest (1098 Statements) _____
Real Estate Taxes **(HUD CLOSING STMT. FOR ANY PROPERTY BOUGHT OR SOLD)** _____
Personal Property Taxes _____
Sales Tax on Large Purchases (Vehicle, Boat, Etc.) _____
Charitable Contributions (Cash) _____
Charitable Contributions (Noncash) _____
Unreimbursed Employee Expenses _____
Tax Preparation Fees/Safe Deposit Box/Etc. _____

ESTIMATED TAX PAYMENTS:
(Include amounts and dates paid for federal and state) _____

****Due to tax law changes, please attach original documentation.**