General information you will need for your personal tax return

Please only complete this section if you are new, you have had changes from last year, or you have child care expenses.

Taxpayer

Full name ______________________

Date of Birth ______________________

Social Security Number ______________________

Occupation ______________________

Current Address ______________________

____

Spouse

Full name ______________________

Date of Birth ______________________

Social Security Number ______________________

Occupation ______________________

Current Address ______________________

____

Dependent 1

Full name ______________________

Date of Birth ______________________

Social Security Number ______________________

Childcare: Cost ______________________

Name ______________________

Address ______________________

Federal ID # or Individual SS# ______________________

Phone # ______________________

Dependent 2

Full name ______________________

Date of Birth ______________________

Social Security Number ______________________

Childcare: Cost ______________________

Name ______________________

Address ______________________

Federal ID # or Individual SS# ______________________

Phone # ______________________

Dependent 3

Full name ______________________

Date of Birth ______________________

Social Security Number ______________________

Childcare: Cost ______________________

Name ______________________

Address ______________________

Federal ID # or Individual SS# ______________________

Phone # ______________________

Dependent 4

Full name ______________________

Date of Birth ______________________

Social Security Number ______________________

Childcare: Cost ______________________

Name ______________________

Address ______________________

Federal ID # or Individual SS# ______________________

Phone # ______________________

*****Very important things to remember when preparing and gathering your information before your appointment:**

*Always bring ALL documents you receive that say Tax Document.

*For previous clients; A customized checklist can be requested by sending an email with the subject "Checklist"

*We do not need your bank statements unless specifically requested.

*We do not need your full year of investment statements. We only need the Final Year End Summary.

*We do not need receipts. Only final figures that have been calculated.

The following is a list of information you should have with you during your appointment or when you send your information.
Having your information all at once will help ensure that your tax return is prepared completely and in a timely manner.

Please check off which documents you are submitting **TOTAL AMOUNTS:**

- ☐ A copy of last years returns (only if I did not prepare them)
- ☐ W2 forms from all employers **How many W2's are you submitting?** ______________________
- ☐ Health Insurance Statements (1095 A,B,or C) ***** Everyone is required to bring this**
- ☐ State Refund (1099G)
- ☐ Unemployment (1099G)
- ☐ Social Security (SS)
- ☐ Spouse Social Security
- ☐ Pension or Retirement Income (1099R)
- ☐ Any ***Interest*** earned statements. (1099INT) Example: year end checking or savings statement
- ☐ Any ***Dividend*** income statements. (1099D) Example: Credit Union year end statement.
- ☐ Any ***Investment*** year end statements. (1099B) Please make sure that the information includes an original purchase date and the cost basis (original cost)
- ☐ K-1's from business or trust
- ☐ Cancellation of Debt (1099C) Example: If you have settled with a Credit Card company during the year.
- ☐ Real Estate Taxes paid (this is sometimes found on your Mortgage Interest statement) $ ______________________

- [ ] Mortgage Interest Statement $ ____________
- [ ] Medical costs $ ____________
- [ ] State Disability (1099G)
- [ ] Mortgage Insurance Premium (this is also sometimes found on your Mortgage Interest statement) $ ____________
- [ ] Donations by cash or check $ ____________
- [ ] Non-cash donations such as clothing
- [ ] Accountant and/or Legal Fees $ ____________
- [ ] Investment Fees $ ____________
- [ ] Any foreign income statements.
- [ ] Volunteer Firefighters please let us know your station and it's address. ____________

- [ ] Any estimated tax payments made to state or federal government **Please complete additional section below** $ ____________
- [ ] Sales Tax paid on MAJOR purchases $ ____________
- [ ] Tuition information for taxpayer, spouse, or dependent children. Please bring form (1098T) or provide the totals and the Institutions EIN. **Tuition:** $ ____________ **Books:** $ ____________
- [ ] Cost & details of any energy improvement made to primary residence. **Please complete additional section below.** $ ____________
- [ ] Are either you or your spouse a teacher? **YES or NO (Circle One)**
- [ ] If you purchased a new home then your HUD 1 or closing statement
- [ ] Do you want to do an IRA if you can? **YES or NO (Circle One)** if you did one, how much? $____________

The following expenses are only for eligible taxpayers:

Employee Business Expenses
(not self employed expenses)

Mileage	
Tolls & Parking	
Local Travel	
Long Day Meals	
Phone	
Supplies	
Business Gifts	
Seminars or Classes	
Dues and Subscriptions	
Resumes	
Union Dues	
Job Hunting	

Moving Expenses
(only if work related and new job is more than 50 miles away from previous residence)

Cost to transport household and personal goods	$
Travel (includes lodging but NOT meals)	$
Any money reimbursed by employee	$

Energy Credits:

Solar Electric	$
Solar Water	$
Wind	$
Geothermal Heat Pumps	$
Insulation Materials or Systems	$
Exterior Doors	$
Metal or Asphalt Roof	$
Exterior Windows or Skylights	$

Estimated Tax Payments Made:

Dates:	**Federal**	Dates:	**State**	Dates:	**Local**
	$		$		$
	$		$		$
	$		$		$
	$		$		$