



## Tax Return Checklist

Name: \_\_\_\_\_

Year: \_\_\_\_\_

- \_\_\_\_\_ W-2's
- \_\_\_\_\_ Interest & Dividend Income Statements
- \_\_\_\_\_ K-1's Received from any Corporation, Partnership, Estate, or Trust Unemployment Statement
- \_\_\_\_\_ Social Security Statement
- \_\_\_\_\_ Amount of Last Year's State Refund
- \_\_\_\_\_ Information Regarding Sale of any Investment Property or Stock
  - Date Purchased \_\_\_\_\_ Purchase Price \_\_\_\_\_
  - Date Sold \_\_\_\_\_ Selling Price \_\_\_\_\_
- \_\_\_\_\_ Information regarding sale of personal residence
  - Original Purchase Price \_\_\_\_\_ Cost of any improvements \_\_\_\_\_
  - Settlement Sheet on Home Sold \_\_\_\_\_ Settlement Sheet on New Home \_\_\_\_\_
- \_\_\_\_\_ Pension Income or Distribution Statements from Retirement Programs
- \_\_\_\_\_ Rental Property Income & Expenses
- \_\_\_\_\_ Farm Income & Expenses
- \_\_\_\_\_ Any Other Income Information
- \_\_\_\_\_ Alimony Received or Paid (Provide Name and Social Security Number)
- \_\_\_\_\_ Ira Contributions or Sep or Keogh Contributions
- \_\_\_\_\_ Medical Expenses (Doctors, Dentists, Eye, Chiropractic, or Medicine)
- \_\_\_\_\_ Vehicle Excise Tax
- \_\_\_\_\_ Real Estate Taxes
- \_\_\_\_\_ Any Other Personal Property Tax (Boats, Motor Homes, or Trailers)
- \_\_\_\_\_ Home Mortgage Interest Paid (1st & 2nd or Equity Line Interest)
  - If paid to any individual: Name, Address, & Social Security Number of Payee Charitable Contributions (Cash & Non-Cash Detailed)
- \_\_\_\_\_ Job Related Expenses not reimbursed
- \_\_\_\_\_ Child Care Expenses (Name of Provider and Their Soc. Sec. # or EIN #)
- \_\_\_\_\_ Copy of Last Year's Tax Return

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**If you have any questions, please call Sonya or Sandy at 801-838-8900**