SPECIALIZING IN SMALL BUSINESSES & TAXES

Name ____________________________ Year _________

Personal Tax Return Checklist
All may not apply

_______ 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 Years 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 (If a Business, ask for our Business Information Worksheet)

_______ 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 Years Tax Return (If not Prepared by Accounting Unlimited)

If you decide to drop off your information, Please ask to fill out a new client card.

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