

Some of the items needed to prepare *MOST* 1040 tax returns : ( If you receive a form 1099 or 1098 for anything – **BRING IT** with you )

1. \_\_\_\_\_  **ALL W-2 / 1099 forms** ( bring the actual papers with you )
2. \_\_\_\_\_  Interest / Dividend / Savings Bond amounts received ( **bring all 1099 statements** )
3. \_\_\_\_\_  If you have: a business, are a sub-contractor, a rental property you rent to someone else, request additional assistance.
4. \_\_\_\_\_  **If you sold property** ( house, stock, land, etc – **bring ALL 1099-B forms - you will need to know** )

quantity / description of property : \_\_\_\_\_

**Did you** => date acquired : \_\_\_\_\_

**sell** => date sold : \_\_\_\_\_

**property ?** => sale price \_\_\_\_\_

cost or other basis : \_\_\_\_\_

5. \_\_\_\_\_  amounts received from IRA, Roth, or pension ( including all roll-overs / **bring all 1099-R forms** )
6. \_\_\_\_\_  Unemployment received ( **bring 1099-G forms** )
7. \_\_\_\_\_  amounts received from Social Security / Railroad Retirement ( **bring 1099 forms** )
8. \_\_\_\_\_  other income ( example : gambling winnings )
9. \_\_\_\_\_  amounts contributed to IRA, or Roth ( even if you can not deduct these amounts on your return )
10. \_\_\_\_\_  alimony/spousal support paid or received
11. \_\_\_\_\_  interest paid on a student loan ( **bring ALL 1099-E forms** )
12. \_\_\_\_\_  all medical, dental, prescription, eye glass + related travel expenses + medical insurance
13. \_\_\_\_\_  state and local income taxes paid \$ \_\_\_\_\_ ( usually on W-2 and amounts paid with last year's state/local returns )
14. \_\_\_\_\_  sales tax paid on a motorized vehicle(s)/boat(s)/mobile home(s).
15. \_\_\_\_\_  **Real Estate taxes paid ( city/county/local/school )** If **you** pay taxes yourself \$ amt won't be on mortgage statement
16. \_\_\_\_\_  interest paid on a mortgage \_\_\_\_\_ equity loan \_\_\_\_\_ ( **bring ALL 1098 forms** )
17. \_\_\_\_\_  Mortgage Insurance Premiums paid at settlement on the purchase of a new residence
18. \_\_\_\_\_  cash contributions to a non-profit organization
19. \_\_\_\_\_  value of items donated to a non-profit organization (If motorized vehicle, bring all papers related to the donation)
20. \_\_\_\_\_  cash or property casualty losses incurred during the year ( **subject to restrictions** )
21. \_\_\_\_\_  cost of tools \_\_\_\_\_ uniforms \_\_\_\_\_ education \_\_\_\_\_ union dues \_\_\_\_\_ telephone \_\_\_\_\_ for work
22. \_\_\_\_\_  child care expenses - paid to : \_\_\_\_\_ \$ amount \_\_\_\_\_  
address \_\_\_\_\_ I.D. # \_\_\_\_\_
23. \_\_\_\_\_  educational expenses ( after high school ) amount paid \$ \_\_\_\_\_ for each person listed on return ( **bring 1098-T form** )
24. \_\_\_\_\_  residential energy credit expenses
25. \_\_\_\_\_  buy or sell a property – bring H.U.D. form from settlement ( not sure which is the H.U.D. form – bring everything ).
26. \_\_\_\_\_  copy of last year's tax return - **IF you did not have it completed at this office last year.**