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Checklist for Individual Tax Preparation

Section	Form	Item	Check	Explanations
Income				
	W-2	Wage Statement		
	W-5	Earned Income Credit Advance Payment Certificate		
	K-1	Partnerships or S-Corporation profit or loss		
	1099-B	Sale of Stocks, Mutual Funds and other securities (Include cost basis if available)		
	1099-C	Cancellation of debt statement		
	1099-DIV	Dividend Income		
	1099-G	Unemployment Income, Tax Refunds, etc.		
	1099-INT	Interest income		
	1099-MISC	Miscellaneous Income		
	1099-R	Retirement or pension Income, or distributions from 401K or IRA etc		
	1099-	Other 1099 statements received		
		Sale of Home or Real Estate (with Cost Basis if available)		
		Other income including Gambling Winnings, Jury Pay, Settlements, Prizes, Awards, Other Income		
		Inheritance information: for inheritances received during the tax year		
		Did you operate a part-time,or full time business? If yes, please provide business income statement, or discuss this matter with us.		
Income Adjustments				
		Contributions to Traditional IRA, SEP, SIMPLE, Qualified Plans		
		Contributions to health savings accounts		
		Educator/ Teacher/ or Military personnel expenses		
		Student loan interest paid		
		Tuition and fees deduction		
		Moving expense		
		Alimony paid		
Deductions				
	1098	Mortgage Interest Statement		
		Points paid because of home purchase, refinance or equity loans		
		Real Estate or Property Taxes		
		Investment Interest or investment expenses		
		Charitable Donations (cash or non-cash)		
		Medical insurance premiums paid (not pre-tax)		
		Medical expenses including medical miles		
		Mortgage Insurance Premium (PMI)		
		Unreimbursed Job Expenses - mileage log, materials, tools, union dues, uniforms, reimbursement information if any		
		Tax advice or preparation fees paid during the year		
		Gambling losses to the extent of gambling winnings		
		New Car Purchases		
Exemptions and Credits				
		Dependents, new members of household, births, adoptions. Include new social security numbers and dates of birth if available		
		Amount paid for day care, pre-school, or adoption expenses. Include providers name, address, social security or tax ID number		
		Energy credit (electric or hybrid car, home heating or cooling systems, new windows, doors, insulation, etc)		
		Recently married? Include other spouse information such as SS# and previous year tax return.		
		Earned Income Credit and Child Tax Credit qualification tests include relationship to child or children and residence info.		
		Retirement savings for the year IRA, 401K, 403B, etc		
		Foreign taxes paid during the year		
		Education Credit (Hope or Lifetime Learning Credit). Include tuition and fees paid during the year		
Special Documents				
		Last year tax return (new clients only)		
		Settlement statements(HUD-1) for home sales or purchases during the year		
		Settlement statement: (form HUD-1) for refinance, 2nd mortgage, or home equity loans.		
		Receipts for cash donations (if available)		
		Business owners should provide business income and expenditure information. Refer to this link http://www.rgabase.com/btaxlist.html		