

## INDIVIDUAL TAX PREPARATION CHECKLIST

- Copies of your most recently filed tax return, if not already in our office
- Full names, birthdays, and SS# for all members of the family (parents and children), if not already in our office
- To electronically file your tax return, please include a voided check in your information packet
- Form(s) W-2 (wages, etc)
- Form(s) 1099 (interest, dividends, etc.)
- Form(s) 1099-R (pensions)
- Form(s) SSA-1099 (social security benefits received)
- Form(s) 1099-G (unemployment compensation or state and local tax refunds)
- Schedules(s) K-1 (income/loss from partnerships, S corporations, etc.)
- Self-employed (Summary of business income and expenses)
- Closing statements pertaining to real estate transactions (sale or purchase of a home)
- Statements for stocks, bonds, and other investments; including dates bought and cost
- If you are the seller or buyer involving a seller financed mortgage, please provide the terms of the sale
- Statements for early distribution from retirement accounts (IRA, 401(k), etc.)
  
- Original receipts from charitable organizations showing the amount and date contributed
- Non-Cash charitable contributions made
- Personal property taxes (paid when vehicle is registered)
- Summary of Medical Expenses (medical, dental, hospital, office visits, prescriptions)
- Mileage that you (in your personal auto) have incurred for business outside your normal commute to the workplace
- Form(s) 1098 (mortgage interest) and property tax statements
- Do you have a secondary residence? If so, please provide statement of property taxes and interest statement
- Union or professional dues
- Qualified dependent care expenses
- Education loan interest paid
- Educational expenses paid (tuition and qualified fees)
- Form(s) 1099-Q (Qualified education expenses)
- Amounts contributed to an IRA or 401K
- List of moving expenses
- Amount contributed to AZ schools for tax credit