

TAX PREPARATION CHECKLIST

Name
Address
Is the mailing address the same? Please mark with an X and indicate <i>different address</i> .
<input type="checkbox"/> YES
<input type="checkbox"/> NO

Telephone Numbers	
Cell	()
Home	()
Other	()

Please send in a copy of front and back of your driver's licenses.

	Taxpayer	Spouse	Child	Child
Name				
DOB				

Please use this space to write anything you feel we need to know. Has there been any major changes? Examples marriage, birth of a child, dependent on or off your return, sold or bought a new home. Please describe below.

The following is a check list of items that you should look for and have when filling your taxes.

- W-2 from employers (please indicate the amount of hours and overtime pay if any)
- Social Security (SSA-1099)
- 1099's of miscellaneous income
- 1099 for interest earnings
- Mortgage statement, interest paid and real estate taxes
- Statement from stock or mutual fund sales and purchases
- IRS statements, contributions and withdrawals
- 401(K) or employer sponsored retirement plan statements
- Tuition payments (Form 1098T)
- Dependent care expenses (Name address and EIN # of Payee)
- Medical expenses (if exceeds 10% of adjusted gross income)
- Charitable contributions
- Business expense
- Other – (If purchased a new car in 2025 and took a loan, interest paid for the year)