

DOCUMENT CHECKLIST

Enclose the following documents:

You Spouse Dependents

Documents you received

- | | | | |
|--------------------------|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Prior year federal and state income tax returns <i>(if we do not have them)</i> |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Form W-2's - wage and tax statements |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Form 1098's - includes mortgage interest and student loan interest |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Form 1099's - includes miscellaneous income, interest income, dividend income, sale of home/real estate/investments, unemployment compensation and retirement plan distribution |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Form 2439's - notice to shareholder of undistributed long-term capital gains |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Schedule K-1's - partnership, S Corporation and trust income |

Personal Records

- | | | | |
|--------------------------|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Child and Dependent Care Expenses |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Education Expenses |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Medical Expenses |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Vehicle (Personal Property) Taxed Paid |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Real Estate Taxes |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Mortgage Interest Paid |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Charitable Contributions |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Business or Unreimbursed Employee Expenses |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Gambling Expenses |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Investment Transactions |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Retirement Contributions |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Foreign Earned Income and Foreign Taxes Paid |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Moving Expenses |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Energy Efficiency Property Expenses |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Household Employee Expenses |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Alimony Expenses and/or Income |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Expenses for miscellaneous itemized deductions |

Tax Payments Made (not withholdings)

Federal Payments:

Amount

Date

State Payments

Amount

Date

