Making Your Tax Interview Simple and Easy

Preparation is Half the Victory!

The Tax Quarterback wants to ensure you walk out of our office with a smile and a Big Win!

This simple and easy to follow checklist will serve as one of the most important steps to making sure that happens. You will want to organize your important documents by researching the deductions and credits that may apply to you. Each important client we serve has a different need so your documentation will vary based on your own situation.

Before your appointment, please review these items below and gather them to bring with you:

- ## Your Personal Information - For Each Family Member

Name
Valid Driver's License
Social Security Card /ITIN/ATIN
Date of Birth
Last Year's Tax Return

- ## Your Tax Information and Income

W-2's
Interest (1099-INT or substitute)
Stock Sales (1099-B or Broker Statement)
Dividend Slips (1099-DIV or substitute)
Sale of a Personal Residence
Estimated Taxes Paid
Self-Employment Income and Expenses
State Income Tax Refund (1099-G)
Rental Income and Expenses
Sale of any Business Assets
Gambling or Lottery Winnings (W-2G for some winnings)
IRA or 401(k) Distribution (1099-R)
Pension Income (1099-R)
Social Security or Railroad Retirement (SSA-1099 or RRB-1099)
Unemployment Compensation (1099-G)
Miscellaneous Income (1099-MISC)

- ## List Your Deductions/Adujustments

Educator Expenses
Mortgage Interest
Medical Expenses
Personal Property Taxes or Real Estate
Traditional IRA Contributions
Charitable Contributions (cash & non-cash)
Employee Business Expenses
Gambling Losses
Moving Expenses
Student Loan Interest
Higher Education Expenses

- ## Your Tax Credits

Retirement Savings Contributions Credit
Child Care Provider with Address and Employer Identification Number (EIN) or their Social Security Number (SSN)
Any Adoption Expenses