



TAX APPOINTMENT CHECK LIST

Prepared for Phoenixville Tax Consultant Clients

Personal Data:

- Full name and social security numbers for self, spouse and all dependents
- Prior Years' Tax Returns (*if not prepared by us*)
- Child care provider tax ID or Social Security Number and Address (*including camps and babysitters*)
- 529 contribution beneficiaries' social security numbers

Employment & Income Data:

- W2 forms for all jobs worked during last year
- Partnership and trust income (Forms K-1)
- Pensions and annuities (1099-R)
- Alimony received
- Jury duty pay
- Gambling and lottery winnings and losses (Forms W-2G)
- Prizes and awards
- Scholarships and fellowships
- State and local income tax refund (Forms 1099-G)
- Unemployment compensation (1099-G)

Homeowner/Renter Data:

- Residential address(es) for this year
- Mortgage interest (Form 1098)
- Sale of your home or other real estate (Form 1099-S)
- HUD settlement statements from sale and purchase of new and old property.
- Second mortgage interest paid statements (Form 1098)
- Real estate taxes paid (including county, borough, school, etc.)
- Rent paid during tax year and name of landlord
- Moving expenses

Financial Assets:

- Interest income statements (Forms 1099-INT & 1099-OID)
- Dividend income statements (Forms 1099-DIV)
- Proceeds from broker transactions (Forms 1099-B)
- Cost basis of the stocks sold in the year from your broker statements
- Miscellaneous income including rent and non-employee compensation (Forms 1099-MISC)
- Retirement plan distribution (Forms 1099-R)

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Financial Liabilities:

- Auto loans and leases (*invoice with car value and lease or finance payments*) if vehicle used for business
- Student loan interest paid
- Early withdrawal penalties on CDs and other time deposits

Automobiles, Boats, Snowmobiles, Trailers etc.:

- Personal property tax information (registrations)

Expenses:

- Gifts to charity (receipts for ALL donations is required) and separate total for non-cash donations
- Unreimbursed expenses related to charity/volunteer work
- Unreimbursed expenses related to your job (travel expenses, entertainment, uniforms, union dues, subscriptions, mileage to second job or multiple work sites)
- Investment expenses
- Job-hunting expenses
- Education expenses
- Childcare expenses
- Medical savings accounts statements
- Adoption expenses
- Alimony paid
- Tax return preparation expenses and fees

Self-employment Data:

- K-1s on all partnerships
- Receipts or documentation for business-related income and expenses
- Farm income documentation

Deduction Documents:

- State & local income tax and your estimated tax paid
- IRA, Keogh & other retirement plan contributions
- Medical expenses

Other Items:

- Casualty or theft losses
- Other miscellaneous deductions