



## Tax Preparation Checklist

Tax Year:

General Information		
	Name	Date of Birth
Taxpayer		
Spouse		
Dependent		
Dependent		
Dependent		

Key Contacts		
	Name	Phone Number
Financial professional		
CPA/Accountant		
Insurance representative		
Attorney		
Executor		

The following are items and forms commonly needed to prepare your taxes. You may need more or less, depending on your personal situation.

Social Security number/Tax ID	Domestic and foreign bank account numbers
Tax returns for prior year	Form W2 for all taxpayers
Form 1099-INT, -DIV, -B, or K-1s for investment or interest income	Form 1099-S for sale of personal property
Form 1099-G for unemployment income	Form 1098-T for education expenses
Records of IRA contributions made during prior year	Form SSA-1099 for Social Security income received
Form 1098 for mortgage interest paid	Records of HSA/MSA contributions

Did you receive personal income from any of the following sources?

Y	N		Amount/Other Details
		Employee income	
		Bank account interest	
		Rental property/Real estate income	
		Social Security	
		Unemployment income	
		Alimony payments	
		HSA/MSA savings account distribution	
		Foreign income	
		An estate or trust	
		State and/or local income tax refund	
		Miscellaneous source (prize, award, scholarship, etc.)	

**Did you receive investment income from any of the following sources?**

Y	N		Amount/Other Details
		Sale of stocks, bonds, mutual funds, or other investment	
		Exercise of stock options	
		Sale of employee stock purchase shares	
		U.S. savings bond surrender	
		Dividends	
		Capital gains	
		Annuity contract	
		Certificates of deposit	
		Money market account	
		Retirement plan distributions	

**Do you have information to share about a business?**

Y	N		Amount/Other Details
		Did you own your business during the prior tax year?	
		Did you start your own business during the prior tax year?	
		Did you use your home as a business location?	
		Did you acquire a business partner?	
		Did you sell any aspect of your business (shares, equipment, etc.)?	
		Did you make tax payments during the year?	
		Did you travel for work?	
		Did you charge sales tax?	
		Did you incur membership fees or dues associated with your profession?	
		Did you pay mortgage interest on a business?	
		Did you attend professional training?	
		Did you offer employee benefits?	
—	—	How is your business filed?	
—	—	What is the value of your business, and as of what date?	

**Did you incur any of the following expenses?**

Y	N		Amount/Other Details
		Medical procedure or treatment	
		Health savings account contributions	
		Tuition for self or others	
		Education expenses	
		Student loan payments	
		Investment loss	
		Mortgage interest on a primary or secondary residence	
		Property taxes on any real estate	
		Home equity loan interest	
		Loss from a natural disaster, theft, or other casualty	
		Large financial gift to any one person	
		Charitable donation	
		Alimony payments	
		Taxes (estimated or actual)	

What's changed?		
Y	N	
		Did you purchase a new home?
		Did you sell any property?
		Did your marital status change?
		Did you bring a new baby into the family?
		Did one of your children begin college?
		Did you experience a loss in the family?
		Did you, or anyone in your immediate family, receive an inheritance?
		Did you lose or start a new job?
		Did you receive a salary increase?
		Did you retire?
		Did you move?
		Have there been any changes in your health, or the health of any family members?
		Have your debt levels changed (higher or lower)?
		Are you considering any major purchases in the near future?

Use the "Click for a Free Consultation" button if you would like to explore how we can guide you in making a sounder Financial Decision.

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