Tax Checklist –

Please use this information to prepare for your appointment.

Personal

- ☐ Last Years Tax Return
- ☐ Names, Birth dates, and SS #'s of Household Members
- ☐ Driver's License and SS Cards
- ☐ End of Year Pay Stub
- ☐ Proof Kids Live With You

Income

- ☐ Wages, W-2, 1099R
- ☐ Interest Income, 1099INT
- ☐ Dividend Income, 1099DIV
- ☐ Social Security, SSA-1099
- ☐ Pension, 1099R
- ☐ Business Income/Loss – See Below
- ☐ Stock & Mutual Fund Sales, 1099B
- ☐ Year End Investment Statements to Determine Cost Basis
- ☐ Yearend 401K / 403B to Determine NUA Eligibility
- ☐ Sale on Purchase of Home – HUD1
- ☐ Unemployment, 1099G
- ☐ Gambling/Lottery Winnings, 1099G
- ☐ NJ Homestead Rebate + PTR (Senior Freeze)
- ☐ NJ Homestead Rebate + PTR (Senior Freeze)
- ☐ Miscellaneous Income, 1099MISC
- ☐ Rental Income – See Below
- ☐ Partnership, S Corp & Trust Income

Deductions

- ☐ Alimony Paid - Need SS# of Ex-Spouse
- ☐ Student Loan Interest, 1098E
- ☐ Penalty on Early Withdrawal from Savings
- ☐ IRA Contributions
- ☐ Tuition & Fees Paid, 1098T
- ☐ Charity for Non-Itemizers

Itemized Deductions

- ☐ State Tax Refund
- ☐ Medical, Dental, Eyecare
- ☐ Investment Expenses
- ☐ Long Term Care Premium
- ☐ Real Estate Taxes Paid
- ☐ Gambling/Lottery Losses
- ☐ State & Local Taxes Paid
- ☐ Mortgage Interest, 1098
- ☐ Investment Interest Paid
- ☐ Charitable Contributions

Credits

- ☐ Childcare Credits – Need EIN or SS# of Provider along with Address
- ☐ Education Credits, 1098T
- ☐ Earned Income Credit
- ☐ Retirement Savings Contributions

Self Employed, Business Owners & Rental Property Owners

- ☐ Call to Review Your Individual Situation for Additional Information Needed

Other

- ☐ Life Insurance Policy
- ☐ Long Term Care Policy
- ☐ Changes in Personal Information