



Taxpayer Checklist

(Information you will need before getting your taxes prepared)

PERSONAL INFORMATION

- Valid Picture ID
- Social Security Card For you and your dependents
- Last Year Tax Return (If Applicable)

INFORMATION ON YOUR DEPENDENTS

- Date of Birth
- Social Security Numbers
- Childcare Records
- If You Qualify For EITC you will need additional information for your dependents

*****Choose At Least One Record That Shows Your Dependent Residency

- School Records
- Daycare Records
- Medical Records
- Lease Agreement

INCOME

W2's	State Income Tax Refund
1099 Misc.	1099 R (Pension Income)
1099 INT	Unemployment Compensation
1099 DIV	Rental Income
1099 B	Gambling or Lottery Winnings

EXPENSES

Real Estate Taxes	Tithes and Offering
Mortgage Interest	Charitable Contributions
Employee Business Expenses	Student Loan Interest
Moving Expenses	Private Mortgage Insurance

EDUCATION EXPENSES

- Form 1098T
- Receipts for Tuition and Books

SMALL BUSINESS EXPENSES

Advertising	Repairs and Maintenance	Commission
Supplies	Office Equipment	Taxes and License
Insurance	Legal and Professional Services	Misc. Items

(Any Expenses That Are Used to Operate the Use of Your Business)

HEALTHCARE EXPENSE

1095A	1095B	1095C
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