

CLIENT DETAIL, DOCUMENTS, AND EXPENSES CHECK LIST

TAXPAYER(S) NAMES:

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DEPENDENTS

NAME	SOCIAL SECURITY NUMBER	BIRTH DATE

<<<INCOME>>>

		#	
W-2	WAGES, TIPS, ETC. <small>BRING IN THREE (OR ALL) COPIES OF EACH</small>		✓
W-2G	GAMBLING WINNINGS		
1099-INT	BANK INTEREST ON CHECKING, SAVINGS, OR CD'S		
1099-INT	CREDIT UNION DIVIDENDS		
1099-DIV	DIVIDENDS FROM STOCKS		
1099-R	PENSIONS, IRA DISTRIBUTIONS, PROFIT SHARING, ETC.		
1099-G	GOVERNMENT PAYMENTS LIKE UNEMPLOYMENT		
SSA-1099	SOCIAL SECURITY DISTRIBUTIONS		
1099-MISC	NON-EMPLOYEE COMPENSATION, RENTS, ROYALTIES, ETC.		

STOCK TRANSACTIONS

1099-B or SUBSTITUTES	SALES OF STOCK		
TRANSACTION STATEMENT	PURCHASE DETAILS OF EACH STOCK SOLD		

<<<DEDUCTIONS>>>

1098 or 1099-INT	MORTGAGE INTEREST EQUITY LOAN INTEREST PROPERTY TAX		
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MEDICAL

RECEIPTS OR PAYROLL CHECK STUBS	HEALTH INSURANCE PREMIUMS (NOT SE)	TOTAL AMOUNT→	\$
	DENTAL INSURANCE PREMIUMS (NOT SE)	TOTAL AMOUNT→	\$
RECEIPTS	DOCTORS PAYMENTS OR CO-PAYMENTS	TOTAL AMOUNT→	\$
	DENTISTS PAYMENTS OR CO-PAYMENTS	TOTAL AMOUNT→	\$
	PRESCRIPTIONS	TOTAL AMOUNT→	\$
	APPARATUS <small>(EYEGASSES, CRUTCHES, ETC.)</small>	TOTAL AMOUNT→	\$

CHARITY

HAND WRITTEN LIST OR RECEIPTS	LIST EACH CHARITY WITH AMOUNT AND DATES OF DONATIONS	TOTAL CASH AMOUNT→	\$
		TOTAL NON-CASH AMOUNT→	\$

MISCELLANEOUS

HAND WRITTEN LISTS	UNION DUES, SHOES, UNIFORMS, GOGGLES, PUBLICATIONS, ETC.	TOTAL AMOUNT→	\$
	TAX PREPARATION FEES LAST YEAR	TOTAL AMOUNT→	\$
	GAMBLING LOSSES		

<<<CHILD CARE EXPENSES>>>

CAREGIVER NAME AND ADDRESS	FEDERAL ID NUMBER	CHILDREN'S NAMES	AMOUNT	
			\$	✓
			\$	

<<<PREVIOUS YEAR'S TAX RETURNS!>>>

THE FIRST YEAR YOU ARE A CLIENT, WE NEED TO SEE YOUR PREVIOUS THREE YEARS OF TAX RETURNS.		✓
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