



Cannon Tax & Accounting, Inc,

Tax Return Checklist

9301 G Monroe Road ~ Charlotte, NC 28270

Personal Information:

- Change of address
- Current email address
- Current phone number's
- Filing status
- Dependents' SS# and DOB

New Client:

- Last Years Tax Return
- Voided Check for direct deposit of refunds
- Date of Birth (all family members)

Income and Source Forms:

- Wage statements - Form W-2
- Pension or Retirement Income - Form 1099-R
- Interest & Dividend Income -
Form 1099-INT / Form 1099-DIV
- State Income Tax Refund - Form 1099-G
- Social Security Income - Form SSA 1099
- Unemployment Income - Form 1099-G
- Commissions Received
- Sale of Stocks or Bonds - Form 1099-B
~need cost basis (date purchased / sold - per share)
- IRA / 401k Distributions
- Lottery or Gambling Winnings - Form W-2G
- Alimony Paid or Received
~need name and SS# of payer / receiver
- Cancellation of Debt - Form 1099-C
- Sale of Property / House - need HUD-1 from
purchase and sale of property / house
- Distributions from Health / Medical Savings Accts.
- Form 1099-SA
- Jury Duty Pay

Business Expenses:

- Self Employed Business Income & Expenses
- Form 1099-MISC
- Commissions Paid
- Income & Expenses from Rental Property
- Income from Partnerships, S Corps,
Trusts & Estates - Form K-1

Deductions / Expenses:

- Lottery / Gambling Losses
- Medical Expenses
- Cash / Non-cash Charitable Contributions
- Volunteer Expenses / Miles
- Mortgage or Home Equity Loan Interest Paid
- Form 1098
- Property Tax Paid on Real Estate
- Property Tax Paid on Vehicles & Other Property
- Moving Expenses due to employment
- Educator Expenses
- Tuition & Education Fees - Form 1098-T
- Student Loan Interest - Form 1098-T
- Casualty / Theft Losses
- Federal / State Estimated Taxes Paid
~dates and amounts paid
- Foreign / Other Taxes Paid
- Child Care Expenses & Provider Information
- Unreimbursed Employment Related Expenses
- Job Related Educational Expenses
- Job Search Expenses / Miles
- Investment Fees Paid
- Safety Deposit Box Rental Fees
- Adoption Expenses
- IRA Contributions
- Union / Professional Dues
- Prior Year Tax Prep Fee
- Housing Allowence Amounts for Clergy / Ministers
- Any Additional Income / Expenses - not listed above
- "Green Energy" Purchases
- Hybrid / Clean Diesel Auto Purchases
~need copy of bill of sale
- End of Year Checkstub

Note : There are additional worksheets that go into more detail on several items listed above. Additional material may be requested from you during the interview process. Questions?? Please call 704-849-2199 or email to: info@cannonaccounting.com