

2011 Income Tax Document Checklist

Please provide us with the following documentation/information during your tax appointment or include them if mailing to the office.

The Existence of any/all documents will depend on your particular tax situation.

<u>FORM</u>	<u>(X)</u>	<u>DESCRIPTION</u>
W-2's	<input type="checkbox"/>	From all employers and copy of your last pay stub
W-2G's	<input type="checkbox"/>	Gambling winnings
1099-INT	<input type="checkbox"/>	Interest income from banks, insurance companies, & financial institutions
1099-DIV	<input type="checkbox"/>	Dividend income from banks, corporations, and financial institutions
1099-B	<input type="checkbox"/>	Stock sales & hedging gains/losses
1099-C	<input type="checkbox"/>	Debt Cancellation
1098-E	<input type="checkbox"/>	Interest paid on college loans
1099-G	<input type="checkbox"/>	State tax refunds, unemployment, USDA, and other government payments
1099-MISC	<input type="checkbox"/>	Rent received, custom work, crop insurance proceeds, prizes
1099-PATR	<input type="checkbox"/>	Patronage Dividends
1099-R	<input type="checkbox"/>	IRA, pension and annuity distributions
1099-S	<input type="checkbox"/>	Proceeds from Real Estate Transactions
1099-SSA	<input type="checkbox"/>	Social Security benefit statement
1098-T	<input type="checkbox"/>	College tuition statements
1098	<input type="checkbox"/>	Mortgage interest on a house, farmland or other property
K-1 Schedules	<input type="checkbox"/>	Partnerships, S-Corporations, LLC's, Estates and Trusts
1099-SA	<input type="checkbox"/>	HSA Distributions
	<input type="checkbox"/>	Energy Credit Documentation
	<input type="checkbox"/>	Real Estate Tax Statements for taxes paid
	<input type="checkbox"/>	Closing Statement on Sale of Personal Residence
	<input type="checkbox"/>	Sales Tax paid on purchases of Autos, Boats, Planes & Motorcycles
	<input type="checkbox"/>	Contributions to SEP, IRA, SIMPLE Plans, and HSA's
	<input type="checkbox"/>	Birth date & Social Security card for any new dependents for year
	<input type="checkbox"/>	Daycare providers name, address, social security number and amount paid
	<input type="checkbox"/>	Dated invoices of all major purchases or sales (equipment & investments)
	<input type="checkbox"/>	E-mail addresses for communication purposes
	<input type="checkbox"/>	Cell phone number, if available

NOTE: We have worksheets in our office & published on our website to help you prepare for your upcoming appointment. Some of these include Farm, Self-Employed Business Operations, Itemized Deductions, Rental Income & Expenses, and Daycare & Home Office worksheets.

