

Tax Return Checklist

Here is a handy checklist of items needed to prepare your tax return:

- W-2s (Wage statement) from all your employers
- 1099-INT (interest statements) from all your banks and mutual funds
- 1099-DIV (dividend statements) from your stock broker or mutual fund
- 1099-R (distributions from a pension or IRA)
- 1099-G (Government payments) if you got a state tax refund last year
- 1099-MISC if you had any miscellaneous income from prizes, awards, etc.
- Charitable receipts or canceled checks from your church or charity

If you own a house

- 1098 Mortgage interest statement
- Property taxes paid (bill from the county or your canceled check)

If you had your own business:

- Any 1099MISC forms you received for your services as an Independent Contractor
- A list of commissions, payments or sources of income
- Lists of expenses including: auto expenses (mileage), office expenses, legal & professional fees, supplies, telephone, travel and meals, equipment

If applicable:

- Investment, tax return, and safe deposit box receipts
- Child care receipts
- Unreimbursed employee expenses
- Medical receipts if you had major medical expenses
- Statements on college tuition paid or interest paid on student loans

- A signed copy of the tax preparation engagement letter (available at <http://caroltoppcpa.com/tax-preperation-services/>)

I know it seems like a lot of papers, but keeping good records is the key to lower taxes!

Please also bring along a signed copy of the engagement letter.

Thank you for your business,

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