

## Personal Tax Return Checklist

After completing personal/dependent info checklist, please go over the list below and send the applicable forms/information based on your work/employment situation.

For existing clients from past years, skip the personal information checklist. However, if there are new family members, kindly provide their informations.

**Tax Forms (Wages, Interest, Dividends, Passive Income, etc....** Any tax related forms received such as Form W-2, Form 1099's, Schedule K-1, etc...

**Updates to Contact Information.** Please let us know any updates to your address, phone numbers, and email (for you and spouse, if applicable) if different than previous year.

**Itemized Deductions.** Provide amounts for medical expenses, property taxes, mortgage interest, charitable contributions, and employee business expenses.

**Business Income/Deductions.** Profit and Loss Statement of any business. Also, provide the amount paid for any new assets used in the business such as computers or equipment.

**Capital Gains and Losses.** For any property of asset sold during the year, provide sale information to include original purchase price, date of purchase, sale amount, sale date, and any selling expenses.

**Other Income.** Documentation for any other income received during the year.

**Adjusted Gross Income Deductions.** Provide information related to moving expenses, self-employed health insurance, student loan interest, IRA contributions, and alimony, etc...

**Home Office Deductions.** Square footage of home and office, and expenses for home for rent, mortgage, utilities, and any other expenses.

**Estimated Tax Payments (Personal)** List of any Federal of State estimated tax payments during the year to include amounts and dates of payments.

**Please note, this questionnaire is not a comprehensive list of all required information, and additional documentation may be required.**