

TAX RETURN CHECK LIST

INCOME:			
W2 FORMS		CHILD CARE	
INTEREST INCOME		MUST INCLUDE:	
DIVIDEND INCOME		AMOUNT PER CHILD	
K-1 FORMS		AMOUNT PER FACILITY	
RETIREMENT/PENSION		NAMES OF FACILITIES	
SOCIAL SECURITY		ADDRESSES OF FACILITIES	
UNEMPLOYMENT		TAX I.D. NO PER FACILITY	
STOCK SALES - GAIN/LOSS SUMMARY			
1099A, 1099C, 1099MISC		RENTAL PROPERTY	
1095A, 1095B, 1095C			
		MUST INCLUDE:	
EXPENSES:		PROPERTY ADDRESS	
PROPERTY TAXES: INCLUDE COPY OF PROP. TAX STATEMENT		INCOME BY PROPERTY	
DMV REGISTRATIONS		EXPENSES BY PROPERTY	
CONTRIBUTIONS			
CHARITY MILEAGE		BUSINESS	
MEDICAL EXP		INCOME	
MEDICAL INSURANCE			
COVERED CALIFORNIA PAYMENTS			
MEDICAL MILEAGE		EXPENSES BY CATEGORY	
MORTGAGE INTEREST (1098 MTG FORM)			
CASUALTY LOSS		CREDITS: SUBJECT TO CHANGE	
WORK RELATED EXPENSES:		HOME-ENERGY	
UNION DUES		EXTERIOR WINDOWS	
TELEPHONE		EXTERIOR DOORS	
TOOLS & SUPPLIES		PROPANE	
EDUCATION		HOT WATER	
LICENSES		SOLAR	
ASSOCIATION DUES		ADOPTIONS	
SPECIALTY PROFESSIONS - SEE LIST PROVIDED		RENTERS CREDIT	

ESTIMATED TAX PAYMENTS DATES PAID AND AMOUNTS		PURCHASE OR SELL PROPERTY
FEDERAL		OR REFINANCE
STATE		MUST INCLUDE:
		FINAL SETTLEMENT STATEMENT

ELECTRONIC FILING: __ YES __ NO DIRECT DEPOSIT/WITHDRAWL: __ YES __ NO IF SELECTED YES, YOU MUST PROVIDE THE FOLLOWING: BANK NAME: _____ CHECKING __ SAVINGS __ ROUTING NO: _____ ACCOUNT NO: _____
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NEW FOR ELECTRONIC FILING:
Drivers License Information