

INFORMATION NEEDED TO PREPARE PERSONAL INCOME TAXES

Last year's tax return if we did not prepare your taxes

Full names, birthdates and social security numbers for you and spouse

Complete Address, Phone Number

Dependents' full names, birthdates, social security numbers

W-2s

1099R—Retirement withdrawals

1099G-State Refunds, Gambling winnings, Unemployment Compensation

1098-Interest, Dividends, Mortgage Interest, Debt Forgiveness

Complete Brokerage Statements—End of the year and all others showing stock purchases and stock sales

Rental Property—HUD if new client, real estate taxes, rental income, all expenses, utilities, legal fees, prior depreciation schedule

K-1s from other corporations if we are not doing the taxes for the corporation—also from trusts

Any other income

Alimony paid or received

Interest on College Loans

1099T-Higher Education Expenses for you or your dependents

Health Insurance Premiums if you own your company, but the company does not pay your premiums

IRA Contributions

HSA Contributions, Company Contributions, Deductions, etc

Day Care Expenses, Complete Name, Address and Identification number

Energy Efficient Improvements to your home

Medical Expenses, Health Insurance Premiums, Long Term Health Insurance Premiums, Prescriptions, Medical Mileage, Lodging (if need to go out of town for treatment), Dental, Optical, Eye Glasses, Chiropractic, Acupuncture, Nursing Fees, Contacts and Solution, Crutches,(any thing not covered by your health insurance)

Real Estate Taxes

Personal Property Taxes-cars, trucks, boats, RVs, trailers

Mortgage Interest, Home Equity Interest

Charitable Contributions-If cash--receipts, canceled checks, letters; if goods--name of organization, address, date of gift, description and value of donation, how you determined the value (over \$500, when you purchased and how much you paid for items). You should have taken pictures of donations in 2007.

Safe deposit box fees

Tax preparation fee for previous year (if we prepared your taxes, we have that information)

Work related expenses for W-2 earnings not reimbursed by employers—mileage, travel expenses, uniforms (if not street wear), tools, union dues, continuing education expenses, work related subscriptions, licenses, physicals for work, job hunting expenses

Investment expenses—tax planning, IRA administrative fees, retirement plan fees, fees to collect interest and dividends

Gambling losses—up to amount of winnings—must have receipts

Casualty and Theft losses

Estate taxes, trust administration fees

Legal fees for collecting taxable income or for keeping a job