Personal Tax Return Checklist

- ☐ **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 then 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 amounts paid for any new assets used in the business such as computers or equipment..
- ☐ **Capital Gains and Losses.** For any property or 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 or 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.