

# TAX DROP OFF CHECKLIST

## UPDATE ALL INFO:

- Changes to phone, address, email
- Additions to family, changes in marital status. Please include names, date of birth & social security numbers

## ANY INCOME REC'D:

- W2 (employment)
- 1099R (retirement income distributions)
- Social Security Income
- 1099-MISC (income not regular such as settlements or bonuses)
- 1099W2G (gambling income)
- 1099-NEC (income as self-employed individuals, independent contractors)
- 1099G (unemployment income)
- 1099-DIV (dividend income)
- 1099-INT (interest income)
- 1099B (income from stock sales)

## THOSE WHO OWN HOMES WITH MORTGAGES & NORMALLY ITEMIZE:

- 1098 (mortgage interest income)
- Property tax if you don't pay out of escrow
- DMV reg fees for all vehicle, boats, RVs
- Donations Cash (itemize who & how much)
- Donations non-cash (itemize who & how much)
- Union Dues
- Medical, Dental Expenses if totals more than 10% of your income

## ADDITIONAL ITEMS THAT MAY APPLY:

- Daycare expenses (please include name, address, phone & tax id#)
- College Tuition (FORM 1098-T) also include costs of books, supplies, computers)
- 1098-E Student Loan Interest Paid
- 1099-SA (HSA Distributions form)
- Alimony rec'd or paid
- Solar Purchase (please include contract)
- House Purchase or House Sale (please include the 2pg closing document from Title Company)
- Purchase of new vehicle, RV or Boat (please write down sales tax & reg paid from purchase agreement)
- K1 (forms from partnerships, trusts, etc.)

**THOSE WITH UNREIMBURSED EMPLOYEE EXPENSES (see attached)**

**THOSE WITH RENTAL PROPERTIES (see attached)**

**THOSE WITH SELF EMPLOYED BUSINESS (see attached)**

**THOSE WITH FARM INCOME/EXPENSES (see attached)**