



**General Information**

<input type="checkbox"/>	Copy of Last Year's Tax Return (if available)
<input type="checkbox"/>	Social Security #s for You, Your Spouse, & Dependents
<input type="checkbox"/>	Names, Date of Birth for You, Your Spouse, & Dependents
<input type="checkbox"/>	Dependents Post High School Educational Expenses
<input type="checkbox"/>	Child Care expenses for Each Dependent
<input type="checkbox"/>	Prior Year Personal Identification Number (PIN) - If Applicable
<input type="checkbox"/>	Routing Transmit Number (RTN) - For direct deposit/debit purposes
<input type="checkbox"/>	Bank Account Number (BAN) - For direct deposit/debit purposes

**General Taxable Income**

<input type="checkbox"/>	W-2 Form(s) for Wages, Salaries, and Tips
<input type="checkbox"/>	Interest Income Statements - (1099-INT, 1099-OID)
<input type="checkbox"/>	Dividend Income Statements - (1099-DIV)
<input type="checkbox"/>	Sales of Stock, Land, etc - (1099-B)
<input type="checkbox"/>	Sales of Real Estate - (1099-S)
<input type="checkbox"/>	State Tax Refunds - (1099-G)
<input type="checkbox"/>	Alimony Received or Paid
<input type="checkbox"/>	Unemployment Compensation Received
<input type="checkbox"/>	Miscellaneous Income - (1099-MISC)
<input type="checkbox"/>	
<input type="checkbox"/>	

**Retirement Income**

<input type="checkbox"/>	Retirement Income - (1099-R)
<input type="checkbox"/>	Social Security and Railroad Retirement Income
<input type="checkbox"/>	Form SSA - 1099
<input type="checkbox"/>	

**Business Income**

<input type="checkbox"/>	Business Income & Expenses
<input type="checkbox"/>	Rental Income and Expenses
<input type="checkbox"/>	Farm Income & Expenses
<input type="checkbox"/>	Form K-1 Income from Partnerships, Trusts, and S-Corporations
<input type="checkbox"/>	Miles Traveled for Business Purposes
<input type="checkbox"/>	

**Tax Credits Checklist**

<input type="checkbox"/>	Child Care Provider Address, Tax ID & Amounts Paid
<input type="checkbox"/>	Adoption Expense Information
<input type="checkbox"/>	Foreign Taxes Paid
<input type="checkbox"/>	First Time Home Buyer Tax Credit
<input type="checkbox"/>	

**Estimated Tax Payments Checklist**

<input type="checkbox"/>	Estimated Payments Made with ES Vouchers
<input type="checkbox"/>	Last Year's Tax Return Overpayment Applied to This Year (if applicable)
<input type="checkbox"/>	Off Highway Fuel Taxes Paid

**Expenses & Deductions Checklist**

<input type="checkbox"/>	Medical Expenses for family (if exceeding 7.5% AGI)
<input type="checkbox"/>	Medical Insurance Paid
<input type="checkbox"/>	Prescription Medicines and Drugs
<input type="checkbox"/>	Doctor & Dentist Payments
<input type="checkbox"/>	Hospital & Nurse Payments
<input type="checkbox"/>	Miles Traveled for Medical Purposes
<input type="checkbox"/>	Home Mortgage Interest (Form 1098)
<input type="checkbox"/>	Home Second Mortgage Interest Paid
<input type="checkbox"/>	Real Estate Taxes Paid
<input type="checkbox"/>	State Taxes Paid w/ Last Year's Return (if itemized)
<input type="checkbox"/>	Personal Property Taxes Paid
<input type="checkbox"/>	Cash Contributions to Charities
<input type="checkbox"/>	Fair Market Value of Non-Cash Charitable Contributions
<input type="checkbox"/>	Unreimbursed Expenses Related to Volunteer Work
<input type="checkbox"/>	Miles Traveled for Volunteer Purposes
<input type="checkbox"/>	Casualty & Theft Losses
<input type="checkbox"/>	Tax Preparation Fees
<input type="checkbox"/>	Unreimbursed Expenses Related to Your Job
<input type="checkbox"/>	Miles Traveled Related to Your Job
<input type="checkbox"/>	Union & Professional Dues
<input type="checkbox"/>	Investment Expenses
<input type="checkbox"/>	Job-Hunting Expenses
<input type="checkbox"/>	IRA Contributions
<input type="checkbox"/>	Student Loan Interest Paid
<input type="checkbox"/>	Moving Expenses
<input type="checkbox"/>	