



Individual Tax Return Checklist

Please check the following box for the applicable items and provide us with the related info/documents.

Personal Data

- Social Security Numbers / Tax Identification Number (including spouse and children)/ Date of Birth
- Child-care provider tax I.D. or Social Security Number and Address

Employment & Income Data

- W-2 forms for Employee and 1099-Misc for Independent Contractor/self-employed
- Partnership and trust income
- Pensions and annuities
- Alimony received
- Jury duty pay
- Gambling and lottery winnings
- Prizes and awards
- Scholarships and fellowships
- State and local income tax refund and NJ Saver (Real Estate Tax) Rebate

Homeowner/Renter Data

- Residential address (es) for this year
- Mortgage interest: Form 1098 - HUD-1 Statement if you bought a house during tax year
- Sale of your home or other real estate: Form 1099-S
- Second mortgage / Home Equity Line/Loan - interest paid
- Real estate taxes paid
- Rent paid during tax year
- Moving expenses

Financial Assets

- Interest income statements: Form 1099-INT & 1099-OID
- Dividend income statements: Form 1099-DN
- Proceeds from broker transactions: Form 1099-B, Also provide Buy Date & Amount of the sell item.
- Tax Refunds & unemployment compensation: Form 1099-G
- Miscellaneous income including rent: Form 1099-MISC
- Retirement plan distribution: Form 1099-R
- Residential or Commercial Rental Income & Expenses

Foreign Assets

- Interest or Dividend Income from outside of USA
- Rental Income from outside of USA
- Foreign Bank Account with any time individual or aggregate account balance of \$10,000 or more
- 10% of more Ownership Interest in Foreign business
- Holding Post as an Officer/Director of Foreign business
- Real Estate Primary residence or Rental

Financial Liabilities

- Auto loans and leases (account numbers and car value), if vehicle used for business
- Student Tuition Fee (Form 1098-T) and/or Student loan interest paid
- Early withdrawal penalties on CDs and other time deposits

Automobiles

- Personal property tax information

Individual Tax Return Checklist

Please check the following box for the applicable items and provide us with the related info/documents.

Other Expenses

- Gifts to charity (receipts or canceled check for every dollar donated)
- Un-reimbursed expenses related to volunteer work
- Un-reimbursed expenses related to your job (travel expenses, uniforms, union dues, subscriptions)
- Investment expenses
- Job-hunting expenses
- Education expenses
- Child care expenses
- Medical Savings Accounts
- Adoption expenses
- Alimony paid
- Tax return preparation expenses and fees

Self-employment Data

- K-1s on all partnerships
- Receipts or documentation for business-related expenses
- Farm income
- Estimated Income Tax paid to Federal and State – Please list amount with date paid

Deduction Documents

- State & local income tax: your estimated tax vouchers for the current tax year
- IRA, Keogh & other retirement contributions
- Medical expenses
- Casualty or theft losses
- Other miscellaneous deductions

Also bring any other documents which are not included in above list, but you think it may be relevant to your current year tax return.

If you are a NEW client, then please provide copy of your previous year Federal and State tax return.