Remedy Tax Services

Tel: 703 212 6630, 703 955 0230

Fax: 703 212 9138

Tax Preparation Check List

Personal Data

- [ ] Social Security Numbers (including spouse and children)
- [ ] Child care provider : Name, address and tax I.D. or Social Security Number
- [ ] Alimony paid: Social Security Number

Employment & Income Data

- [ ] W-2 forms for this year
- [ ] Unemployment compensation: Forms 1099-G
- [ ] Miscellaneous income including rent: Forms 1099-MISC
- [ ] Partnership, S Corporation, & trust income: Schedules K-1
- [ ] Pensions and annuities: Forms 1099-R
- [ ] Social Security/RR1 benefits: Forms RRB-1099
- [ ] Alimony received
- [ ] Jury duty pay
- [ ] Gambling and lottery winning
- [ ] Prizes and awards
- [ ] Scholarships and fellowships
- [ ] State and local income tax refunds: Form 1099-G

Homeowner/Renter Data

- [ ] Residential address(es) for this year
- [ ] Mortgage interest: Form 1098
- [ ] Sale of your home or other real estate: Form 1099-S
- [ ] Second mortgage interest paid
- [ ] Real estate taxes paid
- [ ] Rent paid during tax year
- [ ] Moving expenses

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Financial Assets

- ☐ Interest income statements: Form 1099-INT & 1099-OID
- ☐ Dividend income statements: Form 1099-DIV
- ☐ Proceeds from broker transactions: Form 1099-B
- ☐ Retirement plan distribution: Form 1099-R

Financial Liabilities

- ☐ Auto loans and leases (account numbers and car value) if vehicle used for business
- ☐ Student loan interest paid
- ☐ Early withdrawal penalties on CDs and other time deposits

Automobiles

- ☐ Personal property tax information

Expenses

- ☐ Gifts to charity (qualified written statement from charity for any single donations of $250 or more)
- ☐ Unreimbursed expenses related to volunteer work
- ☐ Unreimbursed expenses related to your job (travel expenses, uniforms, union dues, subscriptions)
- ☐ Investment expenses
- ☐ Job-hunting expenses
- ☐ Job-related education expenses
- ☐ Child care expenses
- ☐ Medical Savings Accounts
- ☐ Adoption expenses
- ☐ Alimony paid
- ☐ Tax return preparation expenses and fees

Self-employment Data

- ☐ Business income: Forms 1099-MISC and/or own records
- ☐ Partnership SE income: Schedules K-1

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- [ ] Business-related expenses: Receipts, other documents & own records
- [ ] Farm-related expenses: Receipts, other documents & own records
- [ ] Employment taxes & other business taxes paid for current year: Payment records

Miscellaneous Tax Documents

- [ ] Federal, state & local estimated income tax paid for current year: Estimated tax vouchers, cancelled checks & other payment records
- [ ] IRA, Keogh and other retirement plan contributions: If self-employed, identify as for self or employees
- [ ] Records to document medical expenses
- [ ] Records to document casualty or theft losses
- [ ] Records for any other expenditures that may be deductible
- [ ] Records for any other revenue or sales of property that may be taxable or reportable