

Individual's Tax Preparation Checklist - 2010

The following list is presented to assist you in gathering the tax information and documents we may need in order to prepare your 2010 tax returns. **Please note this is a general list and not necessarily specific to your tax situation.** You should provide us with any additional information you feel may be relevant to your situation. If you are a returning client, we will be happy to provide you with a complete tax organizer based on your 2009 returns.

Personal Information:

- Current email address, phone number(s) and change of address, if relocated
- Did your marital status change during the year? If yes, please let us know.
- Dependent change or addition (including new DOB, & Social Security Number)
- Did you change the bank account that was used for your refund direct deposit in 2009?

Income:

- W-2s
- 1099s (bank interest (INT), investment dividends (DIV), IRA/401k/Pension distributions (R), Gambling)
- Social Security
- K-1s
- Tax refunds (State and/or Local) received in current year for the previous year

Deductions/Credits:

- Closing papers if you bought or sold a home during the year
- Significant medical expenses (if they are above 7½ % of your AGI)
- 1098-Mortgage interest or interest paid and not reported on a 1098
- Car License tabs
- Property taxes paid during the tax year and date paid (please include tax bill)
- Charitable contributions (cash & non-cash); including name for State purposes
- Unreimbursed expenses related to your work (i.e. union dues, work clothes & tools, books etc)
- IRA contributions and type of IRA
- Unreimbursed moving expenses and reason for moving
- Education expenses, for whom, level of education
- Unreimbursed childcare expenses for each child, provider's name and tax ID#

Business & Income Deductions (if applicable):

- Income
- Detail list of all related expenses
- Vehicle mileage (total & business portion)

Investments:

- Purchase price, quantity, & date for any investment security (stocks, bonds, mutual funds) sold during the year
- 1099-S if you sold a home during the year

State & Local Information:

- Taxable value of home (on the tax bill) or rent paid (per month and total) and to whom (name and address)
- Taxes assessed (Not necessarily same as paid during the year)
- Local taxes paid (Non-Residents – Days worked in the city vs. outside the city)