

PERSONAL DATA

- Copies of past 2 years tax returns (1st time clients)
- Social Security numbers and names as they appear on the SS card (including spouse and children)
- Dates of Birth for all persons on tax return

EMPLOYMENT & INCOME DATA

- W-2's for tax year
- Interest Income: 1099-INT & 1099-OID
- Dividend Income Statements: 1099-D
- Pensions and annuities: 1099R
- Social Security Income Statement: SSA-1099
- Alimony received
- Tax refunds & Unemployment Compensation: 1099-G
- Gambling and lottery winnings: W2-G
- Prizes and awards
- Scholarships and fellowships
- Disability Income Statement
- Jury duty pay
- Misc. income including rent: 1099-MISC
- Education fund distribution 1099Q
- Sale of your home or other real estate: 1099-S
- Notice 1444: Economic impact payment received ("Stimulus Check")

DEDUCTIONS

- Medical expenses (RX, Dr's, DDS, medical miles, etc.)
- State and/or local estimated tax payments made
- Contracts for large purchases (cars, boats, etc.)
- Real estate taxes paid
- Mortgage interest: (1st or 2nd Mtg.) 1098-INT
- DMV registration fees
Vehicle 1 _____
Vehicle 2 _____
- Receipts for goods donated to charity
- Un-reimbursed volunteer expenses
- Monetary gifts to charity (receipts for single donations of \$250 or more)
- Child care expenses (including phone #, address and tax I.D. # of provider)
- Medical savings accounts: Form 1099-SA
- Adoption expenses
- Alimony paid and social security number of recipient
- Moving expenses
- IRA, Keogh & other retirement plan contributions

HEALTH INSURANCE

- Proof of health insurance coverage on Forms 1095-A, 1095-B or 1095-C, and form FTB 3895 if enrolled in Covered California

FINANCIAL ASSETS

- Stock/bond year end statements & 1099B (Including orig. purchase price & transaction costs)
- Mutual fund year end statements (Including orig. purchase price & transaction costs)
- Annuity year end statements
- Final escrow closing statement (if home was purchased or refinanced during the year)

HIGHER EDUCATION EXPENSES

- Student loan interest paid: 1098-E
- Qualified fees and expenses for post-secondary education: 1098-T

SELF-EMPLOYMENT DATA

- Business profit & loss statement
- K-1's on all partnerships & corporations
- Rental income/expenses
- Farm profit & loss
- QuickBooks backup files

CASUALTY OR THEFT LOSSES

- Documents re: property loss and insurance reimbursements for losses in a declared disaster area

EXTENDED TAX SERVICE PROGRAM

- Ask your tax preparer about this service!

Notes: _____

 **Download job related & tax worksheets from our tax center at www.summitfinancial1.com**

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