

Individual Tax Return Data Preparation Check List

- 1. Wage income (Form W-2)
- 2. Interest income (Form 1099-Int)
- 3. Dividend income (Form 1099-Div)
- 4. Stock transaction details (Form 1099-B and Form 8949)
- 5. Pension or retirement income (Form 1099R)
- 6. Social Security income (SSA-1099)
- 7. Real estate transaction income (Escrow Statement)
- 8. Rental income and expense
- 9. Sole proprietor business income and expense
- 10. Form K-1 from partnership, S-corporation, or Trust
- 11. Home mortgage interest statement (Form 1098)
- 12. Real estate tax statements
- 13. Medical expense includes prescription medicine, medical insurance
- 14. Doctors Visit mileage and fees
- 15. DMV license fee
- 16. Charity donation receipts
- 17. Prepaid estimated tax records
- 18. New home escrow statement & new car purchase statement
- 19. Cash or non-cash gift or inheritance
- 20. Child and dependent care Expense with the provider's ID and address
- 21. Children Education Expense (Form 1098-T)
- 22. Other tax related information

If you are a new client, please also provide:

- Social Security Number and birthdays for all family members
- Previous year tax return

If you have foreign assets:

- Foreign Bank, Investment, retirement and Insurance Account Monthly Statements
- Foreign Income (Wages, interest, dividends, rental income, etc.)
- Foreign Expenses
- Foreign Partnership or Corporation Financial Statements & Tax Returns
- Foreign Individual Tax Returns

If you are a new green card holder or not sure of your residence filing status in the US, please provide the dates you entered and exited the US for the last three years.

Depending on the complexity of your return, we may ask for additional information. Please make an appointment with us as soon as possible when you have these tax documents ready.