



Taxpayer information (IF NEW customer)

- Last year's taxes
- Social Security Numbers (including spouse and children) - please bring cards or provide copies
- Driver's license (including spouse) – have available or bring copies
- Birth dates (including spouse and children)
- Birth certificates for children without a license – have available or bring copies
- Date of death (if return is for a decedent, please have death certificate or copy)

Income

- Form W-2
- Form 1099-INT & 1099-OID (interest from savings accounts, etc.)
- Form 1099-DIV (dividends earned)
- Form 1099-B (Capital Gains and Losses)
- Income from businesses (including K-1's)
- Form 1099-R (distributions from pensions and annuities)
- Form 1099-SSA (Social Security benefits statements)
- Form 1099-MISC (misc. income)
- Form 1099-G (state and local income tax refunds & unemployment)
- Form 1099-S (Sale of Home, and/or purchase of home contracts, also bring "Settlement Statement(s)")
- Form 1099-SA (HSA distributions) – were these used for qualifying medical? ___ Yes ___ No
- Alimony received \$ _____ for year _____
- Scholarships and fellowships
- Gambling, lottery winnings, prizes, and awards
- Jury duty pay
- Any other income documents

Adjustments

- Educator Expenses (up to \$250)
- Health Savings Account documents (contributions)
- Work related moving expenses
- Self-employed SEP, SIMPLE and qualified plans
- Self-employed health insurance premiums
- Alimony paid (recipient's SSN _____)
- Contributions to IRA (ROTH not necessary)
- Student loan interest (1098-E)
- Tuition and Fees (1098-T)

Deductions

- Unreimbursed medical expenses (*see worksheet*)
- Real estate taxes paid (often on form 1098)
- Personal property taxes paid
- Form 1098 - Home mortgage interest statement plus points
- Gifts to charity (*see worksheet*)
- Unreimbursed employee expenses (*see worksheet*)
- Tax return preparation expenses and fees
- Investment expenses
- Any other deductions

Credits

- Child care expenses (*see worksheet*)
- Education credits
- Adoption expenses

Other Taxes

- Self employment tax
- Statements for early distributions of retirement plans
- Advanced Earned Income Credit
- Household employment taxes
- Additional tax payments

Payments

- Estimated tax payments (including refunds applied from previous year)
- Earned Income Credit
- Amount paid with request for extension

Health Care

- Did you have health care coverage all year?
_____ Yes _____ No _____ Partial Year
- Form 1095-A: Health Insurance Marketplace Statement

NOTE: If you own your own business, please also fill out my Self-Employed Questionnaire, which can be downloaded and printed at www.aprilstaxes.com.

Also "worksheets" referenced above are located in the "Taxpayer Questionnaire."