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Tax Preparation
Financial Planning
Tax Planning/Projections
Financial Statement Preparation
Investment Planning
Retirement/Estate Planning
Business Succession Planning
Life Insurance Evaluation

Serving Deep Creek and the Greater Tidewater Area Since 1976

PROMPT, PROFESSIONAL INCOME TAX PREPARATION

INDIVIDUAL RETURN CHECKLIST

THESE ITEMS WILL BE NEEDED TO PREPARE YOUR RETURN:

- W-2 FORMS
  - RECEIVEDE TIPS/OVERTIME INCOME? - PROVIDE FINAL 2025 PAYSTUB IF POSSIBLE
- 1099 FORMS
  - INTEREST INCOME
  - DIVIDEND INCOME
  - COMMISSIONS/OTHER BUSINESS INCOME
  - SALES OF SECURITIES (REMINDER: NEED COST OF SECURITY & DATE ACQUIRED)
  - IRA/PENSION
  - DISTRIBUTIONS/ROLLOVERS
  - ROTH IRA CONVERSIONS
  - STATE INCOME TAX REFUNDS
  - UNEMPLOYMENT INCOME
- RENTAL INCOME & EXPENSES
- BUSINESS INCOME & EXPENSES
- IRA/KEOGH/SEP CONTRIBUTIONS
- STUDENT LOAN INTEREST (FORM1098-E)
- CHILD CARE EXPENSES, INCLUDING NAME, ADDRESS, AND TAX ID NUMBER OF PERSON OR ORGANIZATION PROVIDING CARE
- 1095-A (MARKETPLACE INSURANCE COVERAGE)
- TEACHER'S CLASSROOM EXPENSES (UP TO $500)
- DRIVER'S LICENSE: STATE/NUMBER/EXP DATE
- OTHER INCOME:
  - JURY DUTY
  - LOTTERY WINNINGS
  - ALIMONY
- SOCIAL SECURITY INCOME
- K-1 FORMS-PARTNERSHIPS, "S" CORPS, LLCs
- COLLEGE COSTS INCLUDING TUITION & BOOKS EVEN IF PAID BY FINANCIAL AID.
  NOTE: ROOM & BOARD ARE <u>NOT</u> DEDUCTIBLE
  NEED FORM 1098T

IF ELIGIBLE TO ITEMIZE, THE FOLLOWING WILL BE NEEDED:

- MEDICAL EXPENSES (IF EXPECTED TO EXCEED 7.5% OF ADJUSTED GROSS INCOME -- HEALTH INSURANCE, PRESCRIPTION MEDICINE, DOCTORS, DENTISTS, HOSPITALS, MILEAGE, L/T CARE PREMIUMS
- REAL ESTATE & PERSONAL PROPERTY TAXES
- MORTGAGE INTEREST (1098)
- CHARITABLE CONTRIBUTIONS, BOTH CASH & PROPERTY

<u>**FOR STATE RETURN**</u>: *L/T CARE INSURANCE PREMIUMS *PMTS TO VA QUALIFIED COLLEGE SAVINGS PLANS (529 PLANS)

<u>**THESE ITEMS ARE NEEDED, BUT WILL BE ON FILE IF WE PREPARED YOUR RETURN FOR THE PRIOR YEAR:**</u>

*COPY OF PRIOR YEAR RETURN

*NAMES, SOCIAL SECURITY NUMBERS, & BIRTH DATES OF TAXPAYER, SPOUSE, & DEPENDENTS

Updated Version: 01/08/2026