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*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:

- | | |
|--|---|
| <input type="checkbox"/> W-2 FORMS | <input type="checkbox"/> CHILD CARE EXPENSES, INCLUDING NAME,
ADDRESS, AND TAX ID NUMBER OF PERSON OR
ORGANIZATION PROVIDING CARE |
| <input type="checkbox"/> 1099 FORMS | <input type="checkbox"/> HEALTH INSURANCE INFORMATION |
| INTEREST INCOME | <input type="checkbox"/> TEACHER'S CLASSROOM EXPENSES |
| DIVIDEND INCOME | <input type="checkbox"/> DRIVER'S LICENSE: STATE/NUMBER/EXP DATE |
| COMMISSIONS/OTHER BUSINESS INCOME | <input type="checkbox"/> OTHER INCOME: |
| SALES OF SECURITIES (REMINDER: NEED
COST OF SECURITY & DATE ACQUIRED) | JURY DUTY |
| IRA/PENSION | LOTTERY WINNINGS |
| DISTRIBUTIONS/ROLLOVERS | ALIMONY |
| ROTH IRA CONVERSIONS | <input type="checkbox"/> SOCIAL SECURITY INCOME |
| STATE INCOME TAX REFUNDS | <input type="checkbox"/> K-1 FORMS-PARTNERSHIPS, "S" CORPS, LLCs |
| UNEMPLOYMENT INCOME | <input type="checkbox"/> COLLEGE COSTS INCLUDING TUITION & BOOKS
EVEN IF PAID BY FINANCIAL AID.
NOTE: ROOM & BOARD ARE <u>NOT</u> DEDUCTIBLE
NEED FORM 1098T |
| <input type="checkbox"/> RENTAL INCOME & EXPENSES | |
| <input type="checkbox"/> BUSINESS INCOME & EXPENSES | |
| <input type="checkbox"/> IRA/KEOGH/SEP CONTRIBUTIONS | |
| <input type="checkbox"/> STUDENT LOAN INTEREST
NEED FORM 1098E | |

IF ELIGIBLE TO ITEMIZE, THE FOLLOWING WILL BE NEEDED:

- | |
|---|
| <input type="checkbox"/> MEDICAL EXPENSES (IF EXPECTED TO EXCEED 7.5% OF ADJUSTED GROSS INCOME --
HEALTH INSURANCE, PRESCRIPTION MEDICINE, DOCTORS, DENTISTS, HOSPITALS, MILEAGE, L/T CARE |
| <input type="checkbox"/> REAL ESTATE & PERSONAL PROPERTY TAXES |
| <input type="checkbox"/> MORTGAGE INTEREST |
| <input type="checkbox"/> CONTRIBUTIONS, BOTH CASH & PROPERTY |

FOR STATE RETURN: ☐ L/T CARE INSURANCE PREMIUMS ☐ PMTS TO VA QUALIFIED COLLEGE SAVINGS PLANS

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

☐ COPY OF PRIOR YEAR RETURN ☐ NAMES, SOCIAL SECURITY NUMBERS, & BIRTH DATES OF DEPENDENTS