



W. F. Robins, III, P.C., CPA, CFP®  
487-9614  
Fax 487-9708  
[bill@wfrobinscpa.com](mailto:bill@wfrobinscpa.com)

*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
- 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
  - NEED FORM 1098E
- CHILD CARE EXPENSES, INCLUDING NAME, ADDRESS, AND TAX ID NUMBER OF PERSON OR ORGANIZATION PROVIDING CARE
- HEALTH INSURANCE INFORMATION
- TEACHER'S CLASSROOM EXPENSES
- 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 NOT 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)
- REAL ESTATE & PERSONAL PROPERTY TAXES
- MORTGAGE INTEREST
- 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