



## TAX APPOINTMENT CHECKLIST

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W-2' s	
Interest Income (1099-INT forms)	
Investment income – dividends (1099-DIV)	
Investment Income – Capital gains/losses	
IRA's / Pension distributions (1099-R)	
Schedule K-1's	
Unemployment benefits (1099-G)	
Social Security (SSA1099)	
HSA statements (1099-SA)	
Self-employed health insurance	
Medical expenses for the year paid out of pocket	
Mortgage Interest (1098)	
Real Estate Taxes – all properties	
Charitable contributions – receipts and statements	
Dependent care information	
529 Plan Contributions	
IRA Contributions	
Rental Properties – Revenues and Expenses	

Did your marital status change ?    Yes \_\_\_\_\_ No \_\_\_\_\_

Did you move ?    Yes \_\_\_\_\_ No \_\_\_\_\_

Did you have a baby ?    Yes \_\_\_\_\_ No \_\_\_\_\_

Do you have a child in college ?    Yes \_\_\_\_\_ No \_\_\_\_\_

**Other 1099 FORMS you may receive:**

1099-MISC – Rents, Royalties, Non-Employee Compensation

1099-K – Merchant Card & Third Party Network Payments