

## Tax Preparation Checklist

This is the basic information you will need to provide us with in order to file your return. If someone else prepared your return last year, we may need to see it. Please have it available.

### **Personal Information**

- Your social security number
- Your spouse's full name and social security number
- Amount of any alimony paid and ex-spouse's social security number
- Rent paid and landlord's name and address for MI rent credit
- Property tax bills for 2010 (info can be obtained free online-we can assist with this)
- Amount paid for home heating 11/1/09-10/31/10 for certain lower income taxpayers

### **Income Information**

- W2 if employee
- Self-employment income (K1's, 1099, expenses)
- Rental income, expense and rental asset information
- Pension, IRA, Annuity income (1099-R)
- Social Security/RRB (1099-SSA, RRB-1099)
- Interest, Dividend income (1099-INT, 1099-OID, 1099-DIV)
- Sales of stock or other property, dates of acquisition and cost/basis (1099-B, 1099-S)
- Unemployment, state tax refund (1099-G)
- Gambling income (W-2G or records showing income, as well as expense records)
- Amount of any alimony received and ex-spouse's name
- Health care reimbursements (1099-SA or 1099-LTC)
- Jury duty records
- Hobby income and expenses
- Prizes and awards
- Cancelled or forgiven debt (1099-C)

### **Itemized Deductions**

Taxpayers can choose to itemize deductions if they have more than the standard deduction. If you're not sure, bring these records and we will figure the best option. Single/Married Separate-\$5,700 Head of Household-\$8,400 Married Joint/Qual. Widower-\$11,400

- Forms 1098 or other mortgage statements
- Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
- Real estate and personal property tax records including MI vehicle registration fees
- Invoice showing amount of vehicle sales tax paid
- HUD statement showing closing date of home purchase
- Cash amounts donated to houses of worship, schools, other charitable organizations
- Records of non-cash charitable donations
- Amounts paid for healthcare insurance and to doctors, dentists, hospitals
- Amounts of miles driven for charitable or medical purposes
- Expenses related to your investments
- Amount paid for preparation of your 2009 tax return
- Employment-related expenses (dues, publications, tools, uniform cost and cleaning, travel,)
- Job-hunting expense

### **Information About Others**

- Dates of birth and social security numbers
- Childcare records (including the provider's ID number) if applicable
- Approximate income of other adults in your home (not for spouse, if you're filing jointly we have that)
- Form 8332, or other documents showing that the other parent is releasing their right to claim the child to you

### **Education Payments**

- Forms 1098-T, 1098-E and info on grants, scholarships and fellowships
- Bills from the educational institution or anything else that itemizes what you paid/received loans for versus what was covered by scholarship or other financial aid

### **IRA Information**

- Amount contributed for 2010 (and 2011, if applicable)
- Traditional IRA basis
- Value of IRAs on Dec. 31, 2010

### **Vehicle Information**

- For Self-employed persons or employees who are not reimbursed
- Total miles driven for the year
  - Total business miles driven-not commuting miles
  - Amount of parking and tolls paid
  - Actual expenses if not claiming mileage deduction