

2010 Tax Document Checklist

___ Social Security numbers and birthdates for everyone included on your return (spouse, children, parents, etc)

___ Last year's tax return and amount paid for preparing the tax return (only if we did not prepare your 2008 tax return)

___ Amount of estimated income tax payments paid in 2009 (both Federal and State) and the dates paid

___ All forms that say W-2, 1098, 1099, or (Schedule) K-1

___ Records of other income (rental, jury duty, gambling, hobby, alimony, state or local income tax refunds, etc.) and expenses, if applicable

___ Income and expense records for work you performed (not already shown on a W-2 or 1099)

___ Purchase date and original cost of any stocks or other property you sold during this year

___ Expenses related to your investments including Safe Deposit Box fees

___ Records of any contributions you made to IRAs or other retirement plans

___ Records for mortgage interest, real estate and personal property taxes paid

___ Amounts donated to houses of worship, schools and other charitable organizations

___ Receipts for any non-cash charitable donations

___ Number of miles driven for charitable or medical purposes

___ Amount paid for health insurance and to doctors, dentists, hospitals, etc.

___ Records to support childcare (name, phone number, and SSN or EIN) and higher education costs (tuition or student loan interest)

___ Non-reimbursed employment-related expenses (union dues, travel, mileage, publications, tools, uniform cost and cleaning, etc.)

___ Job search expenses and unemployment income (if applicable)