

Individual Tax Preparation Appointment Checklist

In order to make your appointment more productive and to insure you have all of your deductions and supporting documents in order, please take a minute to go through this checklist. You can either bring it with you to at your appointment or scan & e-mail or fax all such forms to my office ahead of time. I may need additional information for some items.

- Copy of prior 2 year tax return (New Clients Only)
- Wage from all your employers (W-2)
- Foreigner's U.S. Source Income (1042-S)
- Interest statements from all banks and mutual funds (1099-INT)
- Dividend from stock brokers or mutual funds (1099-DIV)
- Sales of Securities (Form 1099-B)
- State and local tax refund (1099-G)
- Unemployment Compensation (1099-G)
- Retirement Distributions (1099-R)
- Social Security Received (1099-SSA)
- Partnership/S-Corp/Trust/Estate (Sch. K-1)
- Self-Employment (Form 1099-MISC) (Also complete business expense worksheet)
- HSA or Archer MSA (5498-SA or 1099-SA)
- Moving Expense Report
- Tuition Expense (Form 1098-T)
- Student Loan Interest (1098-E)
- Medical expenses
- State income tax paid
- Home Mortgage Interest & Points Paid (1098)
- Property taxes paid (bill from the county or your canceled check)
- Charitable receipts or canceled checks from your church or charity
- Investment interest and expenses
- Child care receipts
- Unreimbursed employee expenses
- Others (please specify): _____

For these items, please provide additional information:

- Rental income
- Foreign income
- Real Estate Sales/Purchases
- Foreign accounts and assets

The filing deadline for your income tax return is **April 15th, 2013**. In order to meet this filing deadline we need your completed tax organizer back by **March 21st**. Any information received after that date may require to file an extension from the IRS.

Any tax due must be paid with the extension by April 15. Any amounts not paid by the filing deadline are subject to interest and late payment penalties. It is your obligation to supply with complete and accurate information from which to make a reasonable estimate of tax liability. The failure to estimate properly the final tax liability can invalidate the automatic extension and subject to taxpayer to additional tax for failure to timely file the return.