



Tax Preparation Checklist for Individuals

We are **ethically bound** to help you pay the lowest tax you are legally required to pay. This list will help us do our job. It is a concise, though not exhaustive, outline of some of the documents we will need when we meet with you.

- ☐ A copy of last year's Federal and State tax returns. (Only for new clients or if we did not prepare the previous year's return)
- ☐ All statements of income, such as:
 - W-2's
 - Interest and Dividend statements (Form 1099)
 - Pension income amounts including Social Security
 - Individual Retirement Account contributions or withdrawals
 - Unemployment income statements
 - Trust, "S" corporation, and/or Partnership income amounts (Form K-1)
- ☐ Amounts of mortgage interest and points paid (Form 1098), real estate and auto excise taxes paid, charitable donations (both cash and non-cash), and "out-of-pocket" medical expenses
- ☐ Records of child care expenses including amounts and payee
- ☐ Lists of any job related expenses, such as:
 - Moving expenses (if your move was job related)
 - Tools and other equipment such as computers, etc.
 - Safety clothing and uniforms
 - Professional books, journals, dues, union dues, etc.
- ☐ Amounts of any estimated tax payments
- ☐ Details of any capital gains transactions
- ☐ If you own rental property or a small business, we will need to see the records pertaining to the property or business

Consult a tax professional and call
Westside Income Tax & Business Services today.

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