

HERE IS A SHORT LIST OF SOME OF THE MORE COMMON TAX DOCUMENTS TO GATHER FOR YOUR TAX RETURN PREPARATION.

Tax Preparation Checklist

Brought to you by:



FOR EVERYONE

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|---|--|
| <input type="checkbox"/> SOCIAL SECURITY CARD AND PHOTO IDENTIFICATION | <input type="checkbox"/> CREDIT FORMS (COLLEGE OR CHILD CARE EXPENSES) |
| <input type="checkbox"/> W2'S AND 1099'S FROM EMPLOYERS AND SOURCES OF INCOME | <input type="checkbox"/> 1098 MORTGAGE FOR PERSONAL RESIDENCE |
| <input type="checkbox"/> CHARITABLE DONATIONS | <input type="checkbox"/> LAST YEAR'S TAX RETURN |

FOR SMALL BUSINESS OWNERS

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|--|---|
| <input type="checkbox"/> TAX IDENTIFICATION NUMBER | <input type="checkbox"/> MILEAGE LOG |
| <input type="checkbox"/> LIST OF EQUIPMENT OR ASSETS | <input type="checkbox"/> BUSINESS USE OF HOME SQ FOOTAGE AND EXPENSES |
| <input type="checkbox"/> INCOME & EXPENSES | <input type="checkbox"/> QUARTERLY TAXES PAID |

FOR RENTAL PROPERTY OWNERS

- | | |
|--|---|
| <input type="checkbox"/> RENTAL INCOME | <input type="checkbox"/> INSURANCE PREMIUMS |
| <input type="checkbox"/> RECEIPTS FOR EXPENSES | <input type="checkbox"/> PROPERTY MANAGEMENT STATEMENT |
| <input type="checkbox"/> MILEAGE LOG | <input type="checkbox"/> MORTGAGE INTEREST AND REAL ESTATE TAXES PAID |