

2011 Individual Tax Information Checklist

To have your return completed by April 17th we must receive all of your tax information by **April 1st**. If we have not received your information by April 1st we will file and extension (\$0 payment unless you contact us prior to April 1st to let us know you need to make an extension payment) and we cannot guarantee April 17 delivery. **Please note our office closes at noon on April 17th.**

- Birthdates of the taxpayer, spouse and any dependents – please provide a list
- Original Form(s) W-2
- Schedule(s) K-1 from partnerships, S-corporations, estates or trusts (other than ones prepared by our firm)
- Information regarding contributions to an IRA or pension or other retirement plan, or notify us of your planned contribution to be made.
- Form(s) 1099 or statements reporting dividend, and interest income
- Form(s) 1099-R reporting retirement income
- Form(s) 1099-SSA from the social security administration
- Form(s) 1099-MISC and any other 1099(s) reporting other income
- Broker statements providing details of capital gains transactions (please provide both the year-end tax reporting statement and the December 2011 account statement). Please review these gain/loss calculations for any missing basis information and be sure to provide us any missing information related to purchase dates and purchase prices.
- Summary of Schedule C business income and related expenses, including business mileage totals
- Form(s) 1098(T) college tuition stmts as well as a summary of actual, tuition, books and educational expenses paid.
- Form(s) 1098 reporting mortgage interest paid
- Copies of real estate tax bills paid during 2011
- Summary of medical expenses, including medical related travel expenses and mileage
- Summary of charitable contributions and charitable mileage
- Legal documents pertaining to the sale or purchase of real property (i.e. HUD closing stmts)

***** Please take a moment to make sure we have current contact information please check box if your address has changed during 2011 or 2012 (Post Office will automatically update and forward this mailing for an address change so please do not assume we know) *****

Name: _____

Address: _____

address change _____

Email: _____

Telephone Information

Home: _____

Work: _____

Cell: _____