HENSLEY & THRONEBERRY | CERTIFIED PUBLIC ACCOUNTANTS

Tax Checklist

General Taxable Income

- ❒ W-2 Form(s) for Wages, Salaries, and Tips
- ❒ Consolidated Investment Broker Statements
- ❒ Interest Income Statements: Form 1099-INT & 1099-OID
- ❒ Dividend Income Statements: Form 1099-DIV
- ❒ Sales of Stock, Land, etc.: Form 1099-B
- ❒ Sales of Real Estate: Form 1099-S
- ❒ State Tax Refunds: Form 1099-G
- ❒ Alimony Received or Paid (Need name, social security, and address of recipient)
- ❒ Unemployment Compensation Received
- ❒ Miscellaneous Income: Form 1099-MISC

Retirement Income

- ❒ Retirement Income: Form 1099-R
- ❒ Social Security Income and Railroad Retirement Income: Form SSA-1099

Business Income

- ❒ Business Income and Expenses
- ❒ Rental Income and Expenses
- ❒ Farm Income and Expenses
- ❒ Form K-1 Income from Partnerships, Trusts, and S-Corporations
- ❒ Tax Deductible Miles Traveled for Business Purposes

Tax Credits

- ❒ Child Care Provider Name, Address, Social Security Number or EIN, and Amounts Paid
- ❒ Adoption Expense Information
- ❒ Foreign Taxes Paid

Insurance

- ❒ Marketplace Health Insurance Statement: Form 1095-A
- ❒ Proof of Insurance

Education

- ❒ Educational Expenses for You and/or Spouse: Form 1099-T
- ❒ Dependents' Post High School Educational Expense: Form 1099-T
- ❒ Student Loan Interest Paid

Tax Estimate Payments

- ❒ Estimated Tax Payments Made with ES Vouchers
- ❒ Last Year's Tax Return Overpayment Applied to This Year
- ❒ Off Highway Fuel Taxes Paid

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Expense and Tax Deduction

- ❒ Medical Expenses for the Family
- ❒ Medical Insurance Premiums Paid After-tax
- ❒ Prescription Medicines and Drugs
- ❒ Doctor and Dentist Payments
- ❒ Hospital Payments
- ❒ Tax Deductible Miles Traveled for Medical Purposes
- ❒ Home Mortgage Interest from Form 1098
- ❒ Second Home Mortgage Interest Paid
- ❒ Line of Credit Interest Paid (If it is for home acquisition or improvement)
- ❒ Real Estate Taxes Paid
- ❒ State Taxes Paid with Last Year's Return
- ❒ Personal Property Taxes Paid
- ❒ Charitable Contributions
- ❒ Unreimbursed Expenses Related to Volunteer Work
- ❒ Miles Traveled for Volunteer Purposes
- ❒ Casualty and Theft Losses
- ❒ IRA Contributions
- ❒ HSA and FSA Contributions

New Client Intake Information

- ❒ Copy of Last Year's Tax Return
- ❒ Copy of ID for You and Spouse
- ❒ Dates of Birth for You and Spouse
- ❒ Social Security Numbers for You, Spouse, and Dependents
- ❒ Dependents' Names and Date of Birth
- ❒ Routing Transmit Number (For direct deposit/debit purposes)
- ❒ Bank Account Number (For direct deposit/debit purposes)

Additional Information

- ❒
- ❒
- ❒
- ❒
- ❒
- ❒