youngandcompany

Saginaw Plaza - 1425 Jefferson Road - Rochester, NY 14623
phone: (585)427-0210 - fax: (888)256-1120
website: www.youngandcompany.net
email: dyoung@youngandcompany.net

Tax Appointment Checklist

Time of Appointment:______________________ Date:__________________________

1. Form W-2 Wage statements from employer.

2. Form 1099-INT Interest statements.

3. Form 1099-DIV Dividend statements from investments.

4. Form 1099-R Pension statements.

5. Form 1099-B From broker for stock and/or mutual fund sales. (Also bring original cost and purchase date for each security sold.)

6. Form 1098 Mortgage interest paid

7. Form K-1 Statement from partnerships or S-Corporations.

8. Social security statements of income.

9. Unemployment income received.

10. Rental income & expenses.

11. Business income & expenses.

12. Farm income & expenses.

13. Real estate taxes paid. (May be reported on the Form 1098)

14. Charitable contributions. (Both cash and non-cash)

15. Estimated tax payments made for Federal and State government. We need the amounts and the dates they were paid.

16. Documentation for any purchases qualifying for Residential Energy Credits.

17. Closing statement/documentation for new home purchased.

18. Dates of birth and social security cards for your dependents.

19. Amount of post-secondary tuition and fees paid plus amounts paid for mandatory books and course materials. We will also need to know how much of the tuition was paid for through a scholarship and/or grant.

20. Student loan interest paid.

21. Medical and dental expenses including long term care insurance premiums paid, if any.

22. Documentation for any large purchases (i.e.; car, boat, RV) that you *paid sales tax* on, including the date purchased.

23. IRA, KEOGH, & SEP contributions.

24. Last Income tax return filed, <u>if prepared by another preparer</u>.

25. VOIDED blank check, if you would like direct deposit of your tax refund