

# INCOME TAX CHECKLIST

Taxpayer's name		Soc. Sec. No.	
Spouse's name		Soc. Sec. No.	
Taxpayer's occupation		Birthdate	Blind?
Spouse's occupation		Birthdate	Blind?
Address			
Phone			
Estimated taxes pd.	Federal	State	Local

## DEPENDENTS

	Name	Soc. Sec. No.	Birthdate	Relationship
1)				
2)				
3)				
4)				
	Income	Support by you	Support by others	Months in your home
1) \$	\$	\$	\$	
2) \$	\$	\$	\$	
3) \$	\$	\$	\$	
4) \$	\$	\$	\$	

NOTE: You must provide a Social Security Number for all dependents.

## PAPERWORK TO BRING

<input type="checkbox"/> W-2s	<input type="checkbox"/> 1099-INTs	<input type="checkbox"/> 1099-DIVs	<input type="checkbox"/> Other 1099s
<input type="checkbox"/> K-1s	<input type="checkbox"/> Tax forms with labels	<input type="checkbox"/> Property tax bill	<input type="checkbox"/> Last year's tax return

## INCOME

### INTEREST INCOME (if not on 1099-INT)

T/S/J	Payer	\$

### DIVIDEND INCOME (if not on 1099-DIV)

T/S/J	Payer	\$

## OTHER INCOME

SALE OF STOCK OR OTHER PROPERTY	Cost	Sales Price

Please bring supporting documents (Form 1099-Bs and statements)

- If you have a business or rental property, please attach an income/loss statement and supporting documents.
- If you borrow money and the debt is canceled or forgiven, please include Form 1099-A and/or 1099-C.

If you have other income, please bring all figures and supporting data. Examples:

Tips	_____
Pensions / annuities	_____
Jury duty	_____
Unemployment (1099-G)	_____
Alimony received	_____
Prizes (1099-MISC)	_____
Self-employment	_____
Partnerships and S corporations	_____
Estates & trusts	_____
Social security benefits	_____
Scholarships & fellowships	_____
Tax refunds	_____
Royalties	_____
Nontaxable income	_____
Gambling	_____
Other _____	_____
_____	_____