

2011



TAX PREPARATION checklist

As you get ready to prepare your income tax returns this year, remember what a wonderful country we live in and the great price that was paid for our freedom!!

By the way, if you know someone interested in buying or selling real estate, please call me with their name and phone number.

Thank you!

Deduction Documents:

- ✓ State & local income tax
- ✓ IRA, Keogh & other retirement plan contributions
- ✓ Medical expenses
- ✓ Casualty or theft losses
- ✓ Other miscellaneous deductions

Self-employment Data:

- ✓ K-1's on all partnerships
- ✓ Receipts or documentation for business-related expenses
- ✓ Farm income

Expenses:

- ✓ Gifts to charity
(receipts for any single donation of \$250 or more)
- ✓ Unreimbursed expenses related to volunteer work
- ✓ Unreimbursed expenses related to your job
(travel, uniforms, union dues, subscriptions)
- ✓ Investment expenses
- ✓ Job-hunting expenses
- ✓ Education expenses
- ✓ Child care expenses
- ✓ Medical Savings Accounts
- ✓ Adoption expenses
- ✓ Alimony paid
- ✓ Tax return preparation expenses & fees

Financial Assets:

- ✓ Interest income statements: Form 1099-int & 1099-OID
- ✓ Dividend income statements: form 1099-DN
- ✓ Proceeds from broker transactions: form 1099-B
- ✓ Tax Refunds & unemployment compensation: Form 1099-G
- ✓ Miscellaneous income including rent: Form 1099-MISC
- ✓ Retirement plan distribution: form 1099-R

Financial Liabilities:

- ✓ Auto loans and leases (account numbers and car value)
if vehicle used for business
- ✓ Student loan interest paid
- ✓ Personal property tax information (automobiles)
- ✓ Early withdrawal penalties on CDs and other time deposits

Employment & Income Data:

- ✓ W-2 forms for this year
- ✓ Partnership & K-1's
- ✓ Pensions & annuities
- ✓ Alimony received
- ✓ Jury duty pay
- ✓ Gambling & lottery winnings
- ✓ Prizes & awards
- ✓ Scholarships & fellowships
- ✓ State & local income tax refund

Homeowner/Renter Data:

- ✓ Residential address(es) for this year
- ✓ Mortgage interest: Form 1098
- ✓ Sale of your home or other real estate: Form 1099-S
- ✓ Second mortgage interest paid
- ✓ Real Estate taxes paid
- ✓ Rent paid during the tax year
- ✓ Moving expenses

Personal Data:

- ✓ Social Security Numbers (including spouse & children)
- ✓ Child care provider tax I.D. or SS #

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