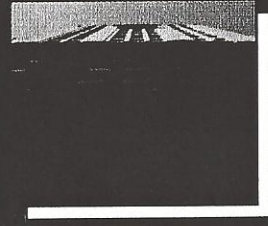
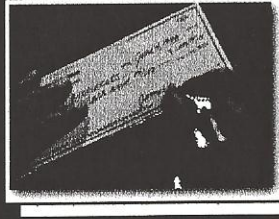
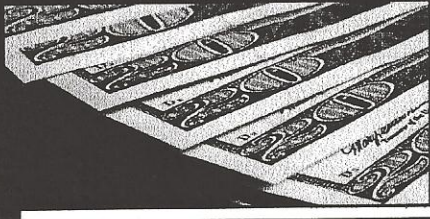


TAX PREPARATION CHECKLIST



Use this checklist to help you gather your important tax information

PERSONAL DATA

- Social Security Numbers (including spouse and children)
- Child care provider: Name, address and tax I.D. or Social Security Number
- Alimony paid: Social Security Number

EMPLOYMENT & INCOME DATA

- W-2 forms for this year
- Unemployment compensation: Forms 1099-G
- Miscellaneous income including rent: Forms 1099-MISC
- Partnership, S Corporation, and trust income: Schedules K-1
- Pensions and annuities: Forms 1099-R
- Social Security/RR1 benefits: Forms RRB-1099
- Alimony received
- Jury duty pay
- Gambling and lottery winnings
- Prizes and awards
- Scholarships and fellowships
- State & local income tax refunds: Form 1099-G

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
- Moving expenses

FINANCIAL ASSETS

- Interest income statements: Form 1099-INT&1099-OID
- Dividend income statements: Form 1099-DIV
- Proceeds from broker transactions: Form 1099-B
- 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
- Early withdrawal penalties on CDs and other time

AUTOMOBILES

- Personal property tax information

EXPENSES

- Gifts to charity (qualified written statement from charity for any single donations of \$250 or more)
- Unreimbursed expenses related to volunteer work
- Unreimbursed expenses related to your job (travel expenses, uniforms, union dues, subscriptions)
- Investment expenses
- Job hunting expenses
- Job related education expenses
- Child care expenses
- Medical Savings Accounts
- Adoption expenses
- Alimony paid
- Tax return preparation expenses and fees

SELF-EMPLOYMENT DATA

- Business income: Forms 1099-MISC and/or own records
- Partnership SE income: Schedules K-1
- Business-related expenses: Receipts, other documents and own records
- Farm-related expenses: Receipts, other documents and own records
- Employment taxes and other business taxes paid for current year: Payment records

MISCELLANEOUS TAX DOCUMENTS

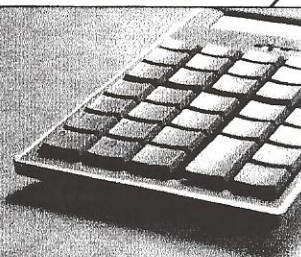
- Federal, state and local estimated income tax paid for current year: Estimated tax vouchers, cancelled checks and other payment records.
- IRA, Keogh and other retirement plan contributions: If self-employed, identify as for self or employees
- Records to document medical expenses
- Records to document casualty or theft losses
- Records for any other expenditures that may be deductible
- Records for any other revenue or sales of property that may be taxable or reportable

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