

2011 INCOME TAX CHECK LIST

- ___ **New Clients:** Prior year copy of federal, state and local returns and depreciation schedules if applicable.
- ___ **Clients 65yrs or older:** Provide Real Estate Tax Amount and/or Rent Expense along with your water bill amount for 2011.
- ___ All W-2's, 1099's, Social Security, Unemployment, Gambling Winnings, Retirement
- ___ Form 1098 (Mortgage Interest State
- ___ Received cash contributions and/or receipts for any non-cash contributions over \$500. Receipts must be filled in with an amount. **No blank forms will be accepted.**
- ___ Auto Excise Tax.
- ___ College Tuition and Student Loan Interest.
- ___ Copies of all LLC, Partnership or S-Corporation K-1's.
- ___ If you bought, sold or refinanced real estate, then a closing statement for each transaction.
- ___ If you sold any shares of mutual funds/stock and basis information is not provided by the broker, detail all activity in the funds sold from original purchase date through date of sale (year-end summary statements are ideal).
- ___ If you are claiming auto mileage as a deduction for business, rental properties or unreimbursed employee expenses, we need to know: total miles, commuting miles, and business miles driven for the year along with odometer reading on 1/1/11 and 12/31/11.
- ___ If you lease your car or are deducting actual expenses for business, rental properties or unreimbursed employee expenses, please also provide: original value of the car (what you could have bought it for) and date of lease, and all expenses for lease payments, gas, car washes, licenses, insurance, tires, repairs, etc.
- ___ Copies of any federal, state or local tax correspondence during the year, including all payments made or refunds received.
- ___ All legal documents pertaining to claiming children and alimony from divorce decree.
- ___ MA 1099-HC (Proof of Health Insurance)
- ___ Retired Public Safety Employees health insurance premium amount.
- ___ Unreimbursed medical expenses
- ___ Rental Income and related expenses.
- ___ Self-Employed need to provide a signed Income and Expenses statement.
- ___ Child care expenses provide day care names, ID#, address, and amount and for which child each applies.