



CHECKLIST ON DOCUMENTS TO BRING FOR TAX PREPARATION

REMINDERS

- Please fill out the checklist form and send your documents by E-fax at (201) 482-5362 at least two(2) days prior to your scheduled appointment.
Kindly indicate your APPOINTMENT DATE & TIME on the fax cover page.
Bring original documents on your appointment date.

TP-Taxpayer SP-Spouse
DOCUMENTS
Prior year's tax returns (NEW CLIENTS ONLY)
INCOME:
Income W-2(s)
Gambling winnings - W-2G(s)
Interest Income - 1099 Interest
Divident Income- 1099 Div
Retirement Distributions -1099 R
SS Benefit - SSA 1099
Alimony Received
Unemployment Compensation / State Refunds - 1099 G
Sold Stocks - 1099 B
Please download & fill out the Schedule D from tha website and e-mail at documents @ taxcorner.us before your appointment
BUSINESS
(Self Employment Income from Schedule C)
1099 Miscellaneous
List of Itemized Expenses ***
RENTAL INCOME
Rental Income
List of Rental Expenses ***
HUD-1(Closing Statement) for Purchase & Refinance
OTHER BUSINESS INCOME
from 1065 (LLC) or 1120S (Corporation)
K-1
SALE/PURCHASE OF HOUSE
HUD-1(Closing Statement) at the time of purchase
HUD-1(Closing Statement) at the time of sale
List of home improvement***
IRA (s)
Traditional IRA (Form 5498)
Roth IRA (Form 5498)
Health Savings Account (Form 1099-SA)
MOVING EXPENSES (applies if a taxpayer moves to a new home because of a new principal work place, with a distance requirement of at least 50 miles)
List of expenses related to moving***
Number of miles from old home to new workplace
Number of miles from old home to old workplace

TP-Taxpayer SP-Spouse
DOCUMENTS
ALIMONY PAID
Recipient Name, address, SS #
Exact Amount \$
CREDITS
Education
Student Loan Interest Statement - 1098 E
Tuition Statement - 1098 T
Payment for Qualified Education Program-1099Q
Child & Dependent Care
Provider's Name, Address, EIN# & Amount
ITEMIZED DEDUCTIONS
INCOME:
List of Medical Expenses
List of Dental Expenses
List of Prescription Drug Expenses
Insurance Premium(before tax deduction)
Property Tax
Sales Tax paid for Car
Mortgage Interest-1098
HUD-1 or Closing Statement for refinance
Charitable Contribution -must present Acknowledgement from Charitable Institution
List of Unreimbursed Employee Expenses (uniforms, duty shoes, small tools, seminars, union dues, job seeking, license, malpractice insurance, books, subscriptions, professional dues, etc.
Safety Deposit Box
Statement of Gambling Losses from Casino (applicable only for those who have gambling winnings)
Last paystub of the year showing information
Mileage (from 1st to 2nd job only)
OTHERS:

*** All must be supported by receipts.

The above indicated documents were completely submitted to Tax Corner for tax preparation purposes.

Signature

Date