2011 Tax Document Checklist

____ Social Security numbers and birthdates for everyone included on your return (spouse, children, parents, etc)

____ Last year's tax return and amount paid for preparing the tax return (only if we did not prepare your 2009 tax return)

____ Amount of estimated income tax payments paid in 2010 (both Federal and State) and the dates paid

____All forms that say W-2, 1098, 1099, or (Schedule) K-1

____ Records of other income (rental, jury duty, gambling, hobby, alimony, state or local income tax refunds, etc.) and expenses, if applicable

____ Income and expense records for work you performed (not already shown on a W-2 or 1099)

____ Purchase date and original cost of any stocks or other property you sold during this year

____ Expenses related to your investments including Safe Deposit Box fees

____ Records of any contributions you made to IRAs or other retirement plans

____ Records for mortgage interest, real estate and personal property taxes paid

____ Amounts donated to houses of worship, schools and other charitable organizations

____ Receipts for any non-cash charitable donations

____ Number of miles driven for charitable or medical purposes

____ Amount paid for health insurance and to doctors, dentists, hospitals, etc.

____Records to support childcare (name, phone number, and SSN or EIN) and higher education costs (tuition or student loan interest)

____ Non-reimbursed employment-related expenses (union dues, travel, mileage, publications, tools, uniform cost and cleaning, etc.)

____ Job search expenses and unemployment income (if applicable)