

## 2015 Individual Tax Information Checklist

To have your return completed by April 15th we must receive all of your tax information by **March 20th**. If we have not received your information by April 1st we will file and extension (\$0 payment unless you contact us prior to April 1st to let us know you need to make an extension payment) and we cannot guarantee April 15 delivery. **Please note our office closes at noon on April 15th.**

- ❖ Birthdates of the taxpayer, spouse and any dependents – please provide a list
- ❖ Original Form(s) W-2
- ❖ Schedule(s) K-1 from partnerships, S-corporations, estates or trusts (other than ones prepared by our firm)
- ❖ Information regarding contributions to an IRA or pension or other retirement plan, or notify us of the contribution you plan to make.
- ❖ Form(s) 1099 or statements reporting dividend, and interest income
- ❖ Form(s) 1099-R reporting retirement income
- ❖ Form(s) 1099-SSA from the social security administration (this is the pink and white form reporting total benefits paid, not your monthly benefit determination letter)
- ❖ Form(s) 1099-MISC and any other 1099(s) reporting other income
- ❖ Broker statements providing details of capital gains transactions (please provide both the year-end tax reporting statement and the December 201 account statement).  
*Please review these gain/loss calculations for any missing basis information and be sure to provide us any missing information related to purchase dates and purchase prices.*
- ❖ Summary of Schedule C business income and related expenses, including business mileage totals
- ❖ Form(s) 1098(T) college tuition stmts as well as a summary of actual, tuition, books and educational expenses paid.
- ❖ Form(s) 1098 reporting mortgage interest paid
- ❖ Copies of real estate tax bills paid during 2015
- ❖ Summary of medical expenses paid during 2015, including medical related travel expenses and mileage
- ❖ Summary of charitable contributions and charitable mileage
- ❖ Legal documents pertaining to the sale or purchase of real property (i.e. HUD closing stmts) for both the purchase and sale of the property

**\*\*\* Please take a moment to make sure we have current contact information please check box if your address has changed during 2015 or in 2016 (Please do not assume we know) \*\*\***

Name: \_\_\_\_\_

Telephone Information:

Home: \_\_\_\_\_ Work: \_\_\_\_\_ Cell: \_\_\_\_\_

Address: \_\_\_\_\_

address change \_\_\_\_\_

Email: \_\_\_\_\_