



Susan Does Taxes LLC

ACCOUNTING, PAYROLL, & PERSONAL TAX SOLUTIONS

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www.SusanDoesTaxes.com

TAX APPOINTMENT PREPARATION SHEET

Personal Information:

- Full name & social security numbers for self, spouse, & all dependents
- Prior Years' Tax Returns (if not prepared by Susan)
- Childcare provider tax ID or Social Security Number & Address (include camps & babysitters)
- 529 contribution beneficiaries' Social Security Number(s)
- Death Certificate copy for loss of spouse in the tax year or the prior year

Employment & Income Data:

- W2's for all jobs worked during tax year
- Partnership & trust income (Form K-1)
- Pensions & annuities (1099-R)
- Alimony received
- Jury duty payment
- Gambling & lottery winnings/losses (Form W-2G)
- Prizes & awards
- Scholarships & fellowships
- State & local income tax refund (Form 1099-G)
- Unemployment compensation (Form 1099-G)

Homeowner/Renter Data:

- Residential address(es) for the tax year
- Mortgage interest (Form 1098)
- Sale of home or other real estate (Form 1099-S)
- HUD settlement statements from sale/purchase of new/old property
- Second mortgage interest paid statements (Form 1098)
- Real estate taxes paid (include county, borough, school, etc.)
- Rent paid during tax year & name of landlord
- Moving expenses

Financial Assets:

- Interest income statements (Forms 1099-INT & 1099-OID)
- Dividend income statements (Form 1099-DIV)
- Proceeds from broker transactions (Form 1099-B)
- Cost basis of stocks sold in the tax year (from broker statements)
- Miscellaneous income including rent & non-employee compensation (Form 1099-MISC)
- Retirement plan distribution (Form 1099-R)

Financial Liabilities:

- Auto loans & leases (invoice with car value & lease/finance payments) IF vehicle used for business
- Student loan interest paid
- Early withdrawal penalties on CDs & other time deposits

Automobiles, Boats, Snowmobiles, Trailers etc.:

- Personal property tax information (registrations)

Expenses:

- Charitable donations & separate total for non-cash donations; receipts required for all donations
- Unreimbursed expenses related to charity/volunteer work
- Unreimbursed expenses related to your job (include travel expenses, entertainment, uniforms, union dues, subscriptions, & mileage to second job or multiple work sites)
- Investment expenses
- Job-hunting expenses
- Education expenses
- Childcare expenses
- Medical savings accounts statements
- Adoption expenses
- Alimony paid
- Tax return preparation expenses & fees

Self-Employment Data:

- K-1 on all partnerships
- Receipts/documentation for business-related income/expenses
- Farm income documentation
- 1099 Miscellaneous received

Deduction Documents:

- State & local income tax & estimated tax paid
- IRA, Keogh, & other retirement plan contributions
- Medical expenses

Other Items:

- Casualty/ theft losses
- Other miscellaneous deductions



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