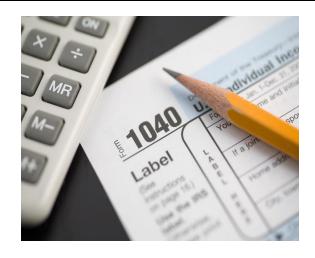


## **Tax Appointment Checklist**



|     | Description   | ✓ |
|-----|---|---|
| 1.  | Last year's tax returns (not necessary for returning clients)           |   |
| 2.  | W-2 Forms   |   |
| 3.  | 1099 Forms for interest and dividends, sale of stock/mutual funds       |   |
| 4.  | 1099-R Forms for pension and IRA distributions                          |   |
| 5.  | New for 2015! Health Insurance Forms 1095-A and 1095-B                  |   |
| 6.  | Other income (alimony, gambling, hobby, cancellation of debt)           |   |
| 7.  | Small business income and expenses                                      |   |
| 8.  | Rental property income and expenses                                     |   |
| 9.  | Statement of IRA contributions made                                     |   |
| 10. | Moving expenses   |   |
| 11. | Child care expenses   |   |
| 12. | Settlement statements from purchase, sale and/or refinancing            |   |
| 13. | Itemized Deductions:  |   |
|     | - Medical expenses  |   |
|     | - Real estate taxes   |   |
|     | - Personal property taxes   |   |
|     | - Mortgage interest statements  |   |
|     | - Charitable contributions - cash and non-cash                          |   |
|     | - Unreimbursed job expenses (mileage, meals, supplies)                  |   |
|     | - Job search expenses   |   |
| 14. | Tuition Savings Plan (529 Plan) contributions and/or Form 1099-Q        |   |
| 15. | Student loan interest statement - Form 1098-E                           |   |
| 16. | College tuition and fees (Form 1098-T), books and supplies receipts     |   |
| 17. | New for 2015! Virginia Driver's License Numbers for Taxpayer and Spouse |   |
| 18. | Record of federal and state estimated tax payments                      |   |
| 19. | IRS and/or state correspondence received                                |   |