



## 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.	<b>New for 2015!</b> 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.	<b>New for 2015!</b> 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	