Accounting Unlimited, Inc.

SPECIALIZING IN SMALL BUSINESSES & TAXES

Name________________________Year________

Personal Tax Return Checklist

All may not apply

*If you are a returning client & you have moved, had children, or gotten married… Please complete a new client info sheet.

_____W-2's

_____Investment Income (1099 INT – 1099 DIV – 1099 B)

_____K-1's Received from any Corporation, Partnership, Estate, or Trust

_____Unemployment Statement (1099 G)

_____Social Security Income Statement (SSA-1099)

_____Amount of Last Years State Refund (1099 G)

_____Pension Income or Distribution Statements from Retirement Programs

_____Home Sale or Purchase (Need Settlement for Each Transaction)

_____Rental Property Income & Expenses (Worksheet on Website)

_____Farm Income & Expenses (Worksheet on Website)

_____Any Other Income Information (If a Business, Business Worksheet on Website)

_____Alimony Received or Paid (Provide Name and Social Security Number)

_____Retirement Contributions Paid Outside W-2 Wages (IRA, Roth, SEP, Keogh)

_____Medical Expenses & Miles (Doctors, Dentists, Eye, Chiropractic, or Medicine)

_____Vehicle Excise or Property Tax

______Real Estate Taxes

_____Any Other Personal Property Tax (Boats, Motor Homes, or Trailers)

_____Home Mortgage Interest Paid (1st & 2nd or Equity Line Interest)

If paid to any individual: Name, Address, & Social Security Number of Payee

_____Charitable Contributions (Cash&Checks - Non-Cash Needs to be Detailed over $500)

_____Job Related Expenses Not Reimbursed

_____Child Care Expenses (Name of Provider, Address and Their Soc. Sec. # or EIN #)

_____Copy of Drivers License or State ID

_____Health Insurance Form 1095 A, B, or C

_____Copy of Last Years Tax Return (If not Prepared by Accounting Unlimited)

Federal				
State Estimates				
Date Paid				
QTR	1	2	3	4

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