



# personal touch tax & financial consultants

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## CHECKLIST

IF THERE ARE ANY QUESTIONS PLEASE FEEL FREE TO CALL US FOR ASSISTANCE.  
REMEMBER TO ROUND TO THE NEAREST WHOLE DOLLAR.

NAME \_\_\_\_\_ YEAR \_\_\_\_\_  
ADDRESS \_\_\_\_\_  
CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_  
PHONE \_\_\_\_\_ EMAIL \_\_\_\_\_

- \_\_\_\_\_ W-2's
- \_\_\_\_\_ INTEREST & DIVIDEND INCOME STATEMENTS
- \_\_\_\_\_ K-1's RECEIVED FROM ANY CORPORATION, PARTNERSHIP, ESTATE, OR TRUST
- \_\_\_\_\_ UNEMPLOYMENT STATEMENT
- \_\_\_\_\_ SOCIAL SECURITY STATEMENT
- \_\_\_\_\_ AMOUNT OF LAST YEARS STATE REFUND
- \_\_\_\_\_ INFORMATION REGARDING SALE OF ANY INVESTMENT PROPERTY OR STOCK  
DATE PURCHASED \_\_\_\_\_ PURCHASE PRICE \_\_\_\_\_  
DATE SOLD \_\_\_\_\_ SELLING PRICE \_\_\_\_\_
- \_\_\_\_\_ INFORMATION REGARDING SALE OF PERSONAL RESIDENCE  
ORIGINAL PURCHASE PRICE \_\_\_\_\_ COST OF ANY IMPROVEMENTS \_\_\_\_\_  
SETTLEMENT SHEET ON HOME SOLD \_\_\_\_\_ SETTLEMENT SHEET ON NEW HOME \_\_\_\_\_
- \_\_\_\_\_ PENSION INCOME OR DISTRIBUTION STATEMENTS FROM RETIREMENT PROGRAMS
- \_\_\_\_\_ RENTAL PROPERTY INCOME & EXPENSES (CLICK HERE FOR OUR RENTAL PROPERTY WORKSHEET)
- \_\_\_\_\_ FARM INCOME & EXPENSES (CLICK HERE FOR OUR FARMING OPERATION WORKSHEET)
- \_\_\_\_\_ ANY OTHER INCOME INFORMATION (BUSINESSES CLICK HERE FOR FOR OUR BUSINESS INFORMATION WORKSHEET)
- \_\_\_\_\_ ALIMONY RECEIVED OR PAID (PROVIDE NAME AND SOCIAL SECURITY NUMBER)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- \_\_\_\_\_ IRA CONTRIBUTIONS OR SEP OR KEOGH CONTRIBUTIONS
  - \_\_\_\_\_ MEDICAL EXPENSES (DOCTORS, DENTISTS, EYE, CHIROPRACTIC, OR MEDICINE)
  - \_\_\_\_\_ VEHICLE EXCISE TAX \_\_\_\_\_ REAL ESTATE TAXES
  - \_\_\_\_\_ ANY OTHER PERSONAL PROPERTY TAX (BOATS, MOTOR HOMES, OR TRAILERS)
  - \_\_\_\_\_ HOME MORTGAGE INTEREST PAID (1ST AND 2ND OR EQUITY LINE INTEREST)
- IF PAID TO ANY INDIVIDUAL: NAME, ADDRESS AND SOCIAL SECURITY NUMBER OF PAYEE

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- \_\_\_\_\_ CHARITABLE CONTRIBUTIONS (CASH AND NON-CASH DETAILED)
- CASH & NON CASH CONTRIBUTIONS CLICK HERE TO REFERENCE NON-CASH GUIDELINE WORKSHEET.
- \_\_\_\_\_ JOB RELATED EXPENSES NOT REIMBURSED
- \_\_\_\_\_ CHILD CARE EXPENSES (NAME OF PROVIDER AND THEIR SOCIAL SECURITY OR EIN NUMBER)

\_\_\_\_\_  
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\_\_\_\_\_ COPY OF LAST YEARS TAX RETURN (NEW CLIENTS ONLY)



TAX PREP



TAX PLANNING



CONSULTING



RECORD KEEPING



PAYROLL



TRAINING



REPRESENTATION



SCAN & ARCHIVE