CHECKLIST FOR 2015 TAX PREPARATION

To expedite the preparation of your taxes, please provide the following documents, as they apply to you (and Joint filer, if you file jointly). As you receive documents pertaining to your taxes, check the boxes and keep them with this list to bring to your appointment or include in your mailing to us.

☐	Last year's tax return (if we did not prepare your taxes)

Income:

☐	W2s and last 2015 pay stub
☐	Pension statements
☐	Social Security statement
☐	Unemployment insurance statement
☐	1099s (1099R, 1099DIV, 1099INT, 1099B* and any other 1099s)
☐	K1s**
☐	Rental Income
☐	Self-Employment Income

Deductions:

☐	1098s (Mortgage Interest, Tuition)
☐	Real Estate Taxes
☐	Medical and Dental Expenses
☐	Charitable Contributions
☐	Childcare expenses (provider's tax ID#, address)
☐	2014 Tax Preparation Fee (if we did not prepare your taxes)
☐	2015 Estimated tax cancelled checks (Federal/State), or list payments
☐	Rental Expenses
☐	Self-Employment Expenses
☐	Employee Expenses
☐	Education Expenses
☐	Purchase or sale of residence records / Closing statements

Other:

☐	Banking information for electronic refund and payment
☐	Anything else you think may pertain to your taxes

* 1099Bs are usually received after February 15th, and **K1s after March 15th, so you should schedule your tax appointment accordingly if you are expecting these forms.

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