



## Tax Prep Checklist

Taxpayer Information	
Full Legal Name: _____	
Address: _____	
City: _____	State: _____ Zip: _____
Date of Birth: ____/____/_____	U.S. Citizen? <input type="checkbox"/> Yes <input type="checkbox"/> No
Social Security Number: _____-_____-_____	
or ITIN Number: _____-_____-_____	
Occupation: _____	
Full time student? <input type="checkbox"/> Yes <input type="checkbox"/> No	Paid student loan interest? <input type="checkbox"/> Yes <input type="checkbox"/> No

Spouse Information	
As of December 31, 2009, were you married? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Spouse's Full Legal Name: _____	
Date of Birth: ____/____/_____	U.S. Citizen? <input type="checkbox"/> Yes <input type="checkbox"/> No
Social Security Number: _____-_____-_____	
or ITIN Number: 9____-_____-_____	
Occupation: _____	
Full time student? <input type="checkbox"/> Yes <input type="checkbox"/> No	Paid student loan interest? <input type="checkbox"/> Yes <input type="checkbox"/> No

### Child Information

Name: \_\_\_\_\_

Birthdate: \_\_\_\_\_

U.S. Citizen?    Yes    No

SSN/ITIN: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

# of months lived w you in 2009: \_\_\_\_\_

Full time student?    Yes    No

Name: \_\_\_\_\_

Birthdate: \_\_\_\_\_

U.S. Citizen?    Yes    No

SSN/ITIN: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

# of months lived w you in 2009: \_\_\_\_\_

Full time student?    Yes    No

Name: \_\_\_\_\_

Birthdate: \_\_\_\_\_

U.S. Citizen?    Yes    No

SSN/ITIN: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

# of months lived w you in 2009: \_\_\_\_\_

Full time student?    Yes    No

Name: \_\_\_\_\_

Birthdate: \_\_\_\_\_

U.S. Citizen?    Yes    No

SSN/ITIN: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

# of months lived w you in 2009: \_\_\_\_\_

Full time student?    Yes    No

### Other Dependent Information

Name: \_\_\_\_\_

Birthdate: \_\_\_\_\_

U.S. Citizen?    Yes    No

SSN: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Relationship: \_\_\_\_\_

Name: \_\_\_\_\_

Birthdate: \_\_\_\_\_

U.S. Citizen?    Yes    No

SSN: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Relationship: \_\_\_\_\_

**Schedule A Information**  
**Check any of the following which applied to you in 2009:**

<input type="checkbox"/> Owned a home <input type="checkbox"/> Made a charitable contribution <input type="checkbox"/> Incurred medical expenses <input type="checkbox"/> Paid state or local property taxes <input type="checkbox"/> Paid to have my tax return prepared (or purchased software)	<input type="checkbox"/> Searched for a new job <input type="checkbox"/> Paid work-related expenses <input type="checkbox"/> Owned a safe deposit box <input type="checkbox"/> Paid state or local income taxes <input type="checkbox"/> Paid real estate taxes
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**Schedules B & D Information**  
**Check any of the following which applied to you in 2009:**

<input type="checkbox"/> Owned stocks or bonds <input type="checkbox"/> Sold stocks or bonds <input type="checkbox"/> Sold a house <input type="checkbox"/> Sold other real estate	<input type="checkbox"/> Had an interest in a foreign account <input type="checkbox"/> Owned an interest bearing account <input type="checkbox"/> Sold collectibles or other assets
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**Schedule C Information**

Were you self-employed in 2009?  Yes  No

Business name (if different from your own): \_\_\_\_\_

Business EIN (if different from your own): \_\_\_\_\_

Business address (if different from your own): \_\_\_\_\_

\_\_\_\_\_

Type of business (service or product): \_\_\_\_\_

**Schedule E Information**

<u>Description</u>	<u>Address</u>	<u>Rents Received</u>
Rental #1		\$ _____
Rental #2		\$ _____

Follows is a list of documents that you may need to have on hand.  
Depending on your situation, you may need more information (or less):

- 2008 Tax Return
- Identification (if using a paid preparer)
- Tax Prep Questionnaire (or comparable information)
- Forms W-2 and Forms 1099-MISC (for non-employee compensation)
- Form 1098 (mortgage interest) or Form 1098-E (student loan interest)
- Form 1099-INT (interest) or Form 1099-DIV (dividends)<sup>1</sup>
- Form 1099-B (sales of stocks and bonds)<sup>2</sup>
- Form 1099-G (state/local tax refund in 2009 or unemployment benefits)
- Form 1099-R (retirement benefits, pension, withdrawals and rollovers)
- Social Security statement
- Schedule K-1 (for trust/estate beneficiaries; or members of a partnership, LLC or s-corporation)
- Any other income statements (such as jury duty payments, etc)
- List of gambling winnings & losses
- Receipts for charitable contributions (including mileage logs)
- Receipts for tuition and educational expenses
- Proof of alimony paid or received
- Child Care Provider Name, Address and Tax ID number
- Receipts for doctor's visits, co-pays and related medical and dental expenses
- Proof of payment of real estate and property taxes
- Receipts for unreimbursed job expenses
- Proof of business expenses (including mileage logs & home office expenses)
- Rental real estate expenses (including depreciation schedules)
- HUD-1 statements (if you sold real estate or if you're claiming home buyer's credit)
- List of dates and amounts of estimated payments made for 2009

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<sup>1</sup> Occasionally forms 1099-INT, 1099-DIV and 1099-B are together on a consolidated statement.

<sup>2</sup> See 1 above.