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# ★ACCOUNTING★

## TAXES & MORE<sub>Inc</sub>

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### Tax Interview Checklist

- Wage Statements/W-2(s)
- Pension, retirement income/1099-R(s) or RRB-1099
- Interest and dividend income/1099-INT/1099-DIV
- Commissions
- Statements on the sales of stocks or bonds/ 1099-B
- Self-employed business income & expenses
- Lottery or gambling winnings/losses/W-2G
- Social Security/SSA-1099
- Unemployment income/1099-G
- Income and expenses from rentals
- Alimony paid or received
- Record of purchase or sale of residence
- Medical and dental expenses
- Real estate taxes
- Estimated taxes paid
- Cash and non-cash charitable donations
- Mortgage or home equity loan interest paid/1098
- Unreimbursed employment-related expenses
- Job-related educational expenses
- Child care expenses & provider information
- Social Security card(s)
- Driver's license(s)
- Dependents Social Security cards and dates of birth
- Last year's tax return (*Only needed if you are a new client*)

If you have any questions regarding any of the above item(s), please give us a call @ 727.449.9994.