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| CHECKLIST OF ITEMS TO BRING FOR TAX RETURN | |
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| ITEM | BRING THE FOLLOWING |
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| Wages | <input type="checkbox"/> W-2 |
| Interest / Dividends | <input type="checkbox"/> 1099 INT |
| State Tax Refund | <input type="checkbox"/> 1099 – State of CA Refund |
| Gain on Sale of Stocks | <input type="checkbox"/> 1099-B, Broker Statements |
| Sale of Real Estate | <input type="checkbox"/> 1099-S, Escrows, 1099-C |
| Distribution of Pension / IRA | <input type="checkbox"/> 1099, 1099-R |
| Rents | <input type="checkbox"/> 1099-MISC / Rents |
| Other Income | <input type="checkbox"/> 1099-MISC |
| Gambling Income | <input type="checkbox"/> 1099-G |
| Mortgage Interest Banks | <input type="checkbox"/> 1098 |
| Mortgage Interest Individual | <input type="checkbox"/> Soc.Sec.Number / Interest paid |
| Re-Finance of Home | <input type="checkbox"/> Escrow Stmt. / HUD Stmt. |
| Contributions | <input type="checkbox"/> Cancelled checks and letters for amounts over \$250 |
| Business Expense | <input type="checkbox"/> Auto (beginning and ending mileage), all other Expenses |
| Child Care Deductions | <input type="checkbox"/> Soc.Sec.Number or EIN for all providers of childcare |
| Children under 14 with Interest / Dividends earned | <input type="checkbox"/> 1099-INT / DIV |
| Estimated Taxes paid | <input type="checkbox"/> Cancelled checks |
| Partnership Income | <input type="checkbox"/> Form 1065 / K-1 Schedule |