

WHAT'S IN YOUR SHOEBOX?



715.392.0202

TAX@JMRFG.COM

1225 TOWER AVE. STE. 305  
SUPERIOR, WI 54880

JMRFG.COM

## YOUR TAX RETURN CHECKLIST



We're all about making things simple for our clients.

Use this convenient checklist to ensure that you have all the documents needed for your tax preparer to complete your tax returns accurately and quickly.

COMPLIMENTS OF





## **CHECK OFF THE DOCUMENTS AS YOU OBTAIN THEM.**

### **PERSONAL DATA**

- ☐ Social security numbers (including your spouse & children)
- ☐ Birth dates of taxpayer, spouse and dependents
- ☐ Copy of prior year tax return
- ☐ First and last names of taxpayer, spouse and dependents
- ☐ Taxpayer contact phone and email information
- ☐ Taxpayer and spouse occupation
- ☐ Filing status

### **INCOME DATA & STATEMENTS**

- ☐ W-2 forms
- ☐ K-1s from s-corporation, partnership and trusts
- ☐ Alimony received
- ☐ Jury duty pay
- ☐ State and local tax refunds
- ☐ Scholarships and fellowships
- ☐ Prizes and awards
- ☐ Gambling and lottery winnings (form W2 G)
- ☐ Interest income statements (form 1099-INT & 1099-OID)
- ☐ Dividend income statements (form 1099-DIV)
- ☐ Income tax refunds and unemployment compensation (form 1099-G)
- ☐ Proceeds from broker transactions (form 1099-B)
- ☐ Miscellaneous income (form 1099-MISC)
- ☐ Retirement plan distribution (form 1099-R, RRB 1099)
- ☐ Social security statements (form SSA-1099)
- ☐ Debt cancellation

### **HOME & RENTAL PROPERTY DATA**

- ☐ Sale of home or other real estate (form 1099-S)
- ☐ Rental property income
- ☐ Rental property expenses

### **DEDUCTIONS & EXPENSE DOCS**

- ☐ IRA, SEP, SIMPLE or other retirement plan contributions
- ☐ Casualty and theft losses
- ☐ Health savings account contribution
- ☐ Energy efficiency improvements
- ☐ Child care including amount paid, provider name, tax I.D. or social security number, and address
- ☐ Alimony paid, recipient name & social security number
- ☐ Charitable donations
- ☐ Unreimbursed business or volunteer work expenses
- ☐ Student loan interest paid
- ☐ Tax return preparation fees
- ☐ Investment expenses
- ☐ Education expenses
- ☐ Job-hunting expenses
- ☐ Adoption expenses
- ☐ Moving expenses
- ☐ Medical expenses including health and long term care insurance paid
- ☐ Estimated tax payments made

### **SELF-EMPLOYMENT DATA**

- ☐ Receipts & documentation for all business related income & expenses
- ☐ Vehicle mileage log
- ☐ Home office square footage