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Tax Appointment

Please place a checkmark in all boxes that apply and provide the relevant documents as indicated on the worksheet

- | | | | |
|---|---|--|--|
| <input type="checkbox"/> Married, Divorced or separates in 2010 | -Married -prior year's return both spouses
-Divorced -finalized date, copy of the divorce decree
-Separated - copy of the separate maintenance agreement
-Community Property income allocation | <input type="checkbox"/> Retirement contribution | -Type of plan
-Amount on contribution |
| <input type="checkbox"/> Birth or adoption | -Social Security card and adoption papers | <input type="checkbox"/> Retirement distribution | -Form 1099-R |
| <input type="checkbox"/> Adoption Credit | -Date and amount of expenses, date of adoption, special needs certification | <input type="checkbox"/> Social Security | -Form 1099-SSA |
| <input type="checkbox"/> Death of a child or spouse | -Date of death | <input type="checkbox"/> Sale of Stocks, bonds etc | -Form 1099-B or other sale documents
-Basis of original Cost |
| <input type="checkbox"/> Additional Members of household | -Date of occupancy and relationship | <input type="checkbox"/> Purchase of Stocks, bonds etc personal residence or other real-estate | -Purchase documents, closing papers |
| <input type="checkbox"/> Job Change | -Start date
-Name of new employer
-W-2's from new and old employers | <input type="checkbox"/> Inheritance | -Will, K-1 from estate
-FMV of property on date of death or decedent's basis of death occurred in 2010 and executor elected carryover basis |
| <input type="checkbox"/> Unemployment | -Unemployment form 1099-G | <input type="checkbox"/> Trade any property | -Date of Trade, property given up and
-Property received, basis and FMV
- Qualified intermediary sales agreements or |
| | | <input type="checkbox"/> Start or end a small business | -Formation or termination dates
-Property contributions or distributions
-K-1s if applicable date |

Taxpayer Signature _____

Date _____

Spouse Signature _____

Date _____

- Lawsuit settlement
Date received
-Reason for Settlement
-1099-Misc
- Rental Property
-Income
Expenses
-New property purchased and
Improvements made
- Prizes
-Form 1099-MISC
-Value of prizes not included on
-Form 1099-MISC
- Lottery or Gambling
winnings
-Total amount won whether on
-W-2 or not
-Total amount of loses
- Health Insurance, medical,
dental or drug expenses
-Health Insurance premiums
-Post-tax payments
-Totals of other medical, dental and
drug expenses; if the health
insurance is pretax (ie a section 125
cafeteria plan, premiums have
already been deducted from wages)
- Medical miles (23
cents/mile)
-Total medical miles driven
January- December
- State Income taxes,
property taxes, sales taxes
on vehicles, motorcycles
or homes
-Prior year's income tax return
-Property tax bills
-Closing papers from the purchase
or sale of property
-Letter from the state regarding any
change in prior-filed return
- Refinance a home
-Closing papers with amount
borrowed
-Form 1098
-Description of use of money
- First time home buyer
credit
-Credit no longer available in 2012
- Recapture of credit taken
2009 or later
-Sale or change of use from principal
residence within thirty six months of
credit
-Closing papers if sold
- Recapture/Repayment
2008 Credit
-Sale or change in use
-Record of amount repaid – year
three of fifteen

- Charitable contributions
ate,
-Date, Amount and type of
contribution, acknowledgment of gift
from the organization if \$250 or
more
-Mileage log for charitable work
- Charitable miles (14
cents/mile)
-Total charitable miles driven
- Transfer of IRA to charity
-Brokerage statement showing
transfer
- Job-related expenses
-Meals, lodging, and miscellaneous
expense amounts for items related to
employment
- Business miles (55.5
cents/mile)
-Total miles driven per vehicle
January- December
-Business miles driven per vehicle
January-December
- Educational expenses
-Form 1098-T for parent or child
-Actual expense record to verify
expenses for credit/deduction
purpose
- Student loan interest
-Interest record for student loans
Form 1098-E
- NA
- Child or disabled spouse care
-Name, address, and ID number of
the daycare provider
-Amount paid to the provider
-If the provider comes into your
home a W-2 may be required
- Energy Credit
-Information regarding the purchase
of solar, geothermal fuel cell or
small wind energy business or
residence
- Bankruptcy filing
-Date filed
-Bankruptcy papers to show
property rejected/returned by
court
- Debt forgiveness of
abandonment of property
-Form 1099-A for abandonment
-Date property was taken by the bank
or sold in foreclosure
- IRS state communications
-Letters additional taxes paid,
changes in prior year tax returns,
installment agreements or offers in
compromise
- Foreign investments or
holdings
-Any foreign financial interest or
accounts?
-Did value of accounts total more
than \$10,000 at any time?

Taxpayer Signature _____

Date _____

Spouse Signature _____

Date _____