

BLUE WATER TAX SERVICES

Tax Return Information Checklist

- _____ **Drivers license, Social Security cards for yourself, spouse and dependents**
- _____ Last year's income tax if you are a new client
- _____ Have you received **all** W-2's from all employers?
(last paycheck stub of the year is also helpful)
- _____ 1099's, including social security, retirement, unemployment & miscellaneous
- _____ Have you received any disability? \$ _____
- _____ Alimony received or paid \$ _____
- _____ Child support received \$ _____
- _____ Did any births, adoptions, marriages, divorces or deaths occur in your family?
(please include names, dates and Social Security numbers)
- _____ Interest & dividend statements, K-1 schedules
(partnerships, S corps, trusts)
- _____ Gambling winnings (if you have winnings, we also need losses)
- _____ Have you cashed in any stocks or bonds? Please include purchase date and purchase price also yearend statements for mutual funds.
- _____ Did you start a new business or purchase any new rental property?
(please include any income and related expenses)
- _____ Purchase and sale information for anything sold during the year including real estate
- _____ Child care expenses and provider name, address and Social Security number
- _____ Charitable deductions, separate cash and merchandise
- _____ Closing statements from homes bought, sold or refinanced during the year
- _____ College tuition (1098T) and student loan interest paid (1098E) Printed statement
- _____ Medical insurance premiums, medical and prescription bills
- _____ Health Insurance/Marketplace Form/1095 A, B or C
- _____ Mortgage and home equity loan statements
- _____ Property tax bills, including those from vacation homes or vacant land
- _____ Rent paid and landlord's name and address
- _____ Job related expenses including union dues
(for auto expenses we need total miles and business miles driven for the year)
- _____ Vehicle license fees
- _____ Amounts of IRA, SEP, KEOGH contributions for the year and year end statements
- _____ Record of any estimated tax payments made
- _____ Investment related expenses