

LIST OF DOCUMENTS TO BRING IN A TAX INTERVIEW

INCOMES

W-2 Employee Wage Statements
W-2P Retirement Pension
1099-INT , Saving Interest
1099-DIV , Dividend Income
1099-MISC , Commission Income
1099-MISC , Rental Income2
1099-G State Tax Refunds
1099-G Unemployment Comp.
Pension / IRA Withdraw/ 1099-R
Social Security Benefits
Self-Employed Business .Attached Record
Partnership Business , K-1.Attached Record
Rental Income in CA, Other State./Expense Record (When Start ?)
Farm Income .Attached Record
Alimony Received
W-2G/ Lottery, Gamblings Winning/ Loss
Awards , Prizes
Capital Gain / Loss.Attached Record
Investment / Stock Sale
Business Property Sale : Estate/ Equipmt
Bartering is an exchange of property or service
Business/ Non-Business Canceled Debts
Host or Hostess Income: host a party and selling.
Life insurance proceeds paid in a Lump Sum
Itemized Deduction Recovery Payments
Foreign Earned Income/ Exclusions ?(F 2555)
Jury Paid
Child Income > \$1,600 (F 8814 / F 8615)
Medicare MSA Distribution (F 8853)
Other Incomes
Other _____ States Income \$ _____

DEDUCTIONS

Child Suport/ Injured Spouse Alloc (F. 8379)
Medical Expense / Hospital / Doctor (Schd. A)
Drug / Treatment / Tools/ Equipment (Schd. A)
Medical Transportation (Schd. A)
Property Tax : House, Mobile Home (Schd. A/ F. 1098)
Personal Tax : Car, Boat, Trailer (Schd. A / DMV)
Auto License Registration Fee (Schd. A / DMV)
Home Loan Orig. Fee / Point deduct (Schd. A/ F. 1098)
Home Mortgage Interest (Schd. A/ F. 1098)
Home Refinance / Improvement (Schd. A/ F. 1098)
Home Insurance
Contributions : [] more than \$250.
Casualty / Thief Loss
Purchase Home/ New Home/ First Buy & Tax Credit?
Personal / Rental Residence : Selling/ When?
Misc. Deduct.: Tax Fee / Dues /
Job Hunt Expense
Child Care
Moving Expense /From Sate/ City/ Miles
IRA / KEOG Contribution
Employee Expense / Own Tools/ Car (Schd. A/ F. 2106)
Employee Car Mileage (Schd. A/ F. 2106)
Student Tuition & Expense& Grants (F.1098-T)
Res.Energy/Gas/ Hybrid Credit (F 5695)
Qualified Educator Expenses
Home Office (F.8829)
Issue Mortgage Credit Certificate(MMC) (F 8396)
Rent over 6 months in California / Landlord Info
General Sales Tax
How much Stimulus Rebate Last Year ?
Qualified Adoption Expenses (F 8839)

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