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The following is a checklist of items that will help you gather the tax information necessary for us to prepare your 2015 Income Tax Returns.

- Previous year's tax return (if not prepared by us)
- Signed Engagement Letter
- Wages and Income Statements (W-2)
- Interest income (form 1099-INT)
- Dividend income (form 1099-DIV)
- Unemployment Compensation and State Tax Refunds (1099-G)
- Alimony Received
- Business Income and expenses See Separate Sheet
- 1099-Misc
- Capital gains & losses please include your year-end stock statements showing your stock and bond sales (if any this year)- purchase price and date, sale price and date (form 1099-B)
- Distributions from pensions, annuities, retirement, or profit-sharing plans, IRAs, Insurance contracts, etc. (1099-R Retirement)
- Rental Income and Expenses – See Separate Sheet
- Form K-1
- Social Security Benefits (1099-SSA)
- Any other Income or losses (including foreign income)
- Gambling wins and losses (W-2G)
- Teacher expenses
- Health Savings accounts (1099-SA)
- Student Loan Interest Expenses
- IRA contributions (Form 5498)
- Higher Education Expenses
- Child Care Expenses

