The Original
TAX PLACE
Your Fast Affordable Tax Professionals On Main Street

Client Document Checklist

In order to facilitate the preparation of your personal tax return, please locate and bring with you as much of the following information as you can. Some of the items listed below may not apply to you and the list is purely a guideline.

- Complete forms W-2 for all employment engagements
- Social security numbers and birth dates for you and all dependents
- All 1099 forms for interest, dividends, miscellaneous income, etc.
- All Social Security Administration statements
- Brokerage end of year statements showing investment transactions for stocks, bonds, etc.
- All partnership K-1 statements
- Statements supporting deductions for charitable contributions
- Statements itemizing property taxes paid during 2007 for your primary and secondary home
- Forms 1098 for mortgage interest for your primary and secondary residences
- Forms 1098 for any student loan interest
- Forms 1098-T for any educational institutions for you and your dependents
- Year-end income statements for your small business activities
- Year-end income statements for each rental property (we will need last year's information for depreciation basis and term)
- Statement of all contributions and distributions to or from IRAs
- Last year's Federal and State tax returns, if possible

Please contact us with any questions. We look forward to serving you.

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