

Carola's Tax Assistance LLC



Preparation Checklist for Individuals

- A copy of last year's Federal and State tax returns.
- All statements of income, such as:
 - o W-2's
 - o Form 1099-Misc
 - o Interest and Dividend statements (Form 1099 INT/DIV)
 - o Pension income amounts including Social Security
 - o Individual Retirement Account contributions or withdrawals
 - o Unemployment income statements
 - o Trust, "S" corporation, and/or Partnership income amounts (Form K-1).
- Amounts of mortgage interest and points paid (Form 1098), real estate and personal property taxes paid, charitable donations (both cash and non-cash), and "out-of-pocket" medical expenses.
- Records of child care expenses including amounts and payee.
- Lists of any job related expenses, such as:
 - o Moving expenses (if your move was job related)
 - o Tools and other equipment such as computers, etc.
 - o Safety clothing and uniforms
 - o Professional books, journals, dues, union dues, etc.
- Amounts of any estimated tax payments.
- Details of any capital gains transactions.
- If you own rental property or a small business, we will need to see the records pertaining to the property or business, please also fill out a Schedule C expense sheet.