

Visit us online at www.GTSpros.com for more information or to set up an appointment. We look forward to working closely with you to making this tax season as positive and hassle-free as possible.

Tax Appointment Checklist

- Social Security Card(s) - Spouse & Children
- Driver's License(s)
- Dependents' Social Security Numbers & Dates of Birth
- Last Year's Federal & State Tax Returns
- Wage Statements - Form W-2
- Pension or Retirement Income - 1099-R
- Interest & Dividend Income - Form 1099-INT/Form 1099-DIV
- Proceeds from Broker Transactions - Form 100-B
- State & Local Income Tax Refund Amounts - Form 1099-G
- Social Security Income - Form SSA-1099
- Unemployment Income - Form 1099-G
- Miscellaneous Income Including Rent - Form 1099-MISC
- Commissions Received
- Commissions Paid
- Sales of Stocks or Bonds - Form 1099-B
- Self-Employed Business/Farm Income & Expenses - Form 1099-MISC
- Self-Employed Business Related Expenses - Receipts, Documents, Records
- Farm-Related Expenses - Receipts, Documents, Records
- Employment Taxes & Other Business Taxes Paid for Current Year - Payment

Records

- Lottery or Gambling Winnings - Form W-2G
- Lottery or Gambling Losses
- Prizes & Awards
- Income & Expenses From Rentals
- Income from Partnerships, S Corporations, Trusts, & Estates - Schedule K-1
- IRA/401K Contributions & Distributions
- Alimony Paid or Received
- Jury Duty Pay

- Child Care Expenses & Provider Information - Including Tax I.D. or Social Security
- Number
- Adoption Expenses
- Medical, Eye Care, & Dental Expenses
- Medical Savings Accounts
- Cash & Noncash Charitable Donations
- Record of Purchase or Sale of Real Residence
- Mortgage or Home Equity Loan Interest Paid - Form 1098
- Real Estate & Personal Property Taxes
- Moving Expenses
- Investment Expenses
- Residential Addresses(s) for this Year
- Rent Paid During the Year
- Home Improvement Expenses
- Unreimbursed Employment-Related Expenses
- Unreimbursed Volunteer-Related Expenses
- Job-Related Educational Expenses
- Job-Hunting Expenses
- Educator Expenses
- Tuition & Education Fees - Form 1098-T
- Student Loan Interest - Form 1098-E
- Scholarships & Fellowships
- Casualty or Theft Losses
- Early Withdrawal Penalties on CDs & Other Time Deposits
- Federal, State & Local Estimated Income Tax Paid for Current Year: Estimated Tax
- Vouchers, Cancelled Checks & Other Payment Records
- IRA, Keogh & Other Retirement Plan Contributions - If Self-Employed, Identify if for
- Self or Employees
- Foreign/Other Taxes Paid
- State & Local Tax Payments
- Other Interest Paid
- Auto Loans & Leases if Vehicle Used for Business
- Gifts to Charity (Qualified Written Statement from Charity for any Single Donation of \$250 or More)
- Tax Preparation Expenses & Fees