



Taxpayer Checklist

(Information you will need before getting your taxes prepared)

Personal Info:

Valid Picture ID
Social Security Card for You and Dependents
Last years tax return (If you have a copy)

Income

W2's	State Income Tax Refund
1099 INT	1099R (Pension Income)
1099 DIV	Unemployment Compensation
1099 B	1099 MISC (Miscellaneous Income)
Self Employment Income	
Rental Income	
Gambling or Lottery Winnings	

Expenses

Real Estate Taxes	Tithes and Offering
Mortgage Interest	Private Mortgage Insurance
Charitable Contributions	Student Loan Interest
Employee Business Expense	
Moving Expenses	
Education Expenses	
Child Care Expenses "If someone keeps your child or children at home you will need their social security and address"	

Expenses for Small Business (Avon, Mary Kay, Babysitting, and ETC.....)

Advertising	Repairs and Maintenance
Car or Truck Expenses	Supplies
Commissions and Fees	Taxes and License
Insurance	Travel, Meals and Entertainments
Legal and Professional Service	Misc Items (cell phone, clothing, & etc)

There are plenty of things not listed, but the list above is the most common.

Xpert Tax Service
Tax Professionals