

### Tax Appointment Check List

Last Year's Tax Returns, State and Federal	
W-2s	
Form 1099's from Banks, Brokerages for investment income	
Form 1098 Mortgage Interest	
Medical Expenses for the year, unless already used under a flexible benefits program	
Dependent child care expenses, plus the name and SSN or EIN of your provider and the amount paid during year unless this amount was already used under a flexible benefits program.	
Charitable Contributions	
Car Registration Paid	
Unreimbursed business expenses or unreimbursed teacher's classroom expenses	
Records of any other employment, unemployment compensation or other sources of income (such as lottery winnings)	
IRA contributions	
Tuition Expenses (Form 1099T)	
Gains/Losses on sale of stock with acquisition dates & stock basis	
Student Loan interest	
Alimony paid or received	
Unreimbursed Moving Expenses	
Education Expenses for K-12 (Iowa Tuition & Textbook Credit)	
Any other losses, such as theft.	
H.S.A. contributions or withdrawals	
<b>If you are Self-Employed, also provide:</b>	
List All Business expenses categorized and receipts. If not exclusively for business purposes, determine the percentage business vs. personal expense.	
Mileage driven for business purposes & total miles driven	
Assets acquired during the year	
Depreciation schedule for assets held	
Health Insurance Paid	
If using credit card for purchases, all statements with purchase descriptions	
Bank statements for year	
Log of meals and/or entertainment	
Names and SSN or EIN of individuals that you paid for their services of \$600 or more in the tax year	
Square footage of home office and square footage of entire home	
Utility bills	
Insurance Bills	
Property Tax Bill (for house or business building)	
If selling a tangible product, inventory value at the beginning of the year and the end of the year.	
Payroll Information on any employees you have	