

**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 .....

**If you are Self Employed, also provide:**

- 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  
and total miles driven .....
- Assets acquired during the year .....
- Depreciation schedule or 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 .....

