Tejani Accounting Services
admin@tejaniaccounting.com

PERSONAL TAX CHECKLIST

PERSONAL INFO:

Please provide us a copy of your Driver's License and SSN Card. (Same for your Spouse – if married)
Also, provide us with the Full Name, Date of Birth and relationship of each dependent.

INCOME (Please submit all that apply)

1. W2 for Taxpayer & Spouse
2. 1099-Int and 1099-Div (Interest & Dividend Statement)
3. 1099-R. (If there has been a retirement distribution this form is needed)
4. 1099-G (Unemployment compensation)
5. W2-G (Lottery Winnings)
6. 1099-Misc (If worked as an independent.
7. 1095-A (Health Insurance Statement from Marketplace)
8. Stock statements from brokerage firms for sale of stocks
9. Schedule K1s from Partnerships, LLCs and S corporations
10. If owning investment property on personal name, details of the property, rental income & expenses.
11. Any other tax relevant documents that you may have.

DEDUCTIONS (Please submit all that apply)

1. Student Loan Interest
2. IRA contributions
3. Personal health insurance payments (If Self-Employed)
4. Home Mortgage Interest Statement (Form 1098)
5. Home property tax payment (May be part of Form 1098)
6. If purchased a new home or refinanced, Pages 1 & 2 of the HUD settlement statement
7. Ad Valorem Taxes (On automobile)
8. Any charitable contributions
9. Any unreimbursed job-related expenses (Such as mileage, travel etc.)
10. Day Care expenses – Please provide the name, address, Federal ID# of the daycare provider.
11. Any other relevant deduction documents

OTHER ITEMS THAT ARE REQUIRED

1. If client needs direct deposit of Refunds, we will need a copy of the void check.
2. Proof of payment of all estimated tax payments made to the IRS and the State.
3. If self-employed please provide an estimate of income and expenses for the current year in order for us to calculate estimated taxes for the current year.
4. A copy of previous year's tax return if our firm did not process your prior year return.