

# TAX APPOINTMENT WORKSHEET

## WILL YOU NEED TO BRING EXTRA DOCUMENTATION?

If this happened in 2013...	Then this is what you need to bring to your tax appointment
Married, Divorced, or Separated in 2013	<input type="checkbox"/> Married - Bring prior year's returns of both spouses <input type="checkbox"/> Divorced - Finalized date, copy of divorce decree <input type="checkbox"/> Separated - Copy of the separate maintenance agreement <input type="checkbox"/> Community property income allocation
Qualify for Eared Income Credit	<input type="checkbox"/> Bring medical or school record proving dependent child's residency <input type="checkbox"/> Child's birth certificate
Birth or Adoption	<input type="checkbox"/> Social Security Cards <input type="checkbox"/> Adoption Papers
Adoption Credit	<input type="checkbox"/> Date and amount of expenses <input type="checkbox"/> Date of adoption <input type="checkbox"/> Special needs certification
Death of child or spouse	<input type="checkbox"/> Date of death
Additional members of household	<input type="checkbox"/> Date of occupancy and relationship
Job change	<input type="checkbox"/> Start date of new job <input type="checkbox"/> Name of new employer <input type="checkbox"/> W-2s from new and old employers
Unemployment	<input type="checkbox"/> Unemployment Form 1099-G
Retirement Contribution	<input type="checkbox"/> Type of plan <input type="checkbox"/> Amount of contribution
Retirement Distributions	<input type="checkbox"/> Form 1099-R
Social Security Benefits	<input type="checkbox"/> Form 1099-SSA
Sale of Stock and Bonds, etc	<input type="checkbox"/> Form 1099-B or other sale documents <input type="checkbox"/> Basis or original costs
Purchase of Stocks, bonds, etc., personal residence, or other real estate	<input type="checkbox"/> Purchase documents <input type="checkbox"/> Closing documents
Inheritance	<input type="checkbox"/> Will, K-1 from the Estate <input type="checkbox"/> Decedent's Basis of Property if death occurred in 2010
Trade any Property	<input type="checkbox"/> Date of trade <input type="checkbox"/> Property given up and property received <input type="checkbox"/> Basis and FMV <input type="checkbox"/> Qualified intermediary sales agreements or <input type="checkbox"/> Other closing documents
Start or end a small business (Sch C, LLC, S or C Corp, or partnership)	<input type="checkbox"/> Formation or termination dates <input type="checkbox"/> Property contributions or distributions <input type="checkbox"/> K-1s if applicable

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Lawsuit settlements	<input type="checkbox"/> Date received <input type="checkbox"/> Reasons for the settlement <input type="checkbox"/> 1099-MISC
Rental Property	<input type="checkbox"/> Income <input type="checkbox"/> Expenses <input type="checkbox"/> New property purchased <input type="checkbox"/> Cost of improvements made
Prizes	<input type="checkbox"/> Form 1099-MISC <input type="checkbox"/> Value of prizes not included on Form 1099-MISC
Lottery or gambling winnings	<input type="checkbox"/> Total amount won whether on W-2G or not <input type="checkbox"/> Total amount of losses
Health insurance; Medical, Dental or Drug Expenses	<input type="checkbox"/> Health insurance premiums <input type="checkbox"/> Post-tax payments <input type="checkbox"/> Totals of other medical, dental, and drug expenses. <input type="checkbox"/> If the health insurance is pre-tax (i.e., cafeteria plans, Sec. 125, POP), premiums have already been deducted from wages.
Medical mileage (24 cents/mile)	<input type="checkbox"/> Total medical miles driven January thru December
State income taxes Property taxes Sales tax on vehicles, motorcycles or homes	<input type="checkbox"/> Prior year's income tax return <input type="checkbox"/> Property tax bills <input type="checkbox"/> Closing papers from the purchase or sale of property <input type="checkbox"/> Letter from the state regarding any change in a prior-filed return
Refinance a Home	<input type="checkbox"/> Closing papers with amount borrowed <input type="checkbox"/> Form 1098 <input type="checkbox"/> Description of use of money
First-time Homebuyer Credit	<input type="checkbox"/> Credit no longer available
Recapture of Credit taken 2009 or after	<input type="checkbox"/> Sale or change of use from principal residence within 36 months of credit <input type="checkbox"/> Closing papers if sold
Recapture/Repayment of 2008 Credit	<input type="checkbox"/> Sale or change of use <input type="checkbox"/> Record of amount repaid - year four of fifteen
Charitable contributions: Money, property, or out-of-pocket expense	<input type="checkbox"/> Date, amount, and type of contribution <input type="checkbox"/> Acknowledgement of gift from the organization if \$250 or more <input type="checkbox"/> Statement regarding whether goods and services were received for donation <input type="checkbox"/> Mileage log for charitable work
Charitable mileage (14 cents/mile)	<input type="checkbox"/> Total charitable miles driven
Transfer of IRA to charity	<input type="checkbox"/> Brokerage statement showing transfer
Job-related expenses	<input type="checkbox"/> Meals, lodging, and miscellaneous expense amounts for items related to employment - not reimbursed.
Business miles	<input type="checkbox"/> Total miles driven per vehicle January thru December