MIKE PARISI
TAX CONSULTANTS

WHAT TO BRING CHECKLIST

The following is a list of some common items needed to complete tax returns (*not all may apply*). ***For organizers, please refer to www.mikeparisitax.com/organizers***

PERSONAL INFORMATION

- [ ] Client Organizer (**REQUIRED** for New Clients; **recommended** for existing clients)
- [ ] Last Year's Tax Return (**REQUIRED** for New Clients)
- [ ] Social Security Numbers and Birth Dates (for all individuals listed on the tax return)
- [ ] Birth Certificates (**REQUIRED** for new dependents)
- [ ] Death Certificate (**REQUIRED** if taxpayer or spouse died during tax year)

INCOME

- [ ] W-2 from **all** employers
- [ ] 1099-NEC - Self-employed/gig/ind. contractor work (must provide completed Profit & Loss Organizer)
- [ ] 1099-MISC - Rents, royalties, or other miscellaneous income
- [ ] 1099-G - Unemployment compensation and/or state tax refunds
- [ ] 1099-R - Distributions from pensions, IRAs, and annuities
- [ ] 1099-SA - Social security benefits
- [ ] 1099-INT - Interest income
- [ ] 1099-DIV - Dividend income
- [ ] 1099-B - Proceeds from stock transactions (provide stock purchase price if not listed on statement)
- [ ] W-2G - Gambling winnings (provide losses as well)
- [ ] Schedule K-1 - Income from Partnerships/S-corps, Trusts, Estates
- [ ] Alimony Received - *for agreements dated 12/31/2017 or earlier*
- [ ] 1099-S - Sale of Real Estate (must provide closing statement & completed Sale of Property Organizer)
- [ ] Rental Income Organizer (new clients with pre-existing Rentals must provide Depreciation schedule)
- [ ] 1099-Q - Distributions from Qualified Tuition Plans

DEDUCTIONS / ADJUSTMETS / CREDITS

- [ ] 1098 - Mortgage Interest Statement (for all mortgages incl. HELOCs)
- [ ] Real Estate Taxes Paid (all properties)
- [ ] Estimated Income Tax Payments for Federal or State(s) (must provide dates)
- [ ] Alimony Paid (provide name, SSN, & address of recipient) - *for agreements dated 12/31/2017 or earlier*
- [ ] 1098-T - Education Expenses from Qualified Institution
- [ ] 1098-E - Student Loan Interest Paid
- [ ] Qualified Tuition Plan Contributions (must provide end of year statement) - *i.e. 529 plans*
- [ ] Childcare Expenses Paid *for dependents under 13 (must provide full name, address, & Tax ID or provider)*
- [ ] Retirement Plan Contributions *for IRAs, Keogh, etc* (must specify type and provide amounts)
- [ ] Medical Expense Receipts/Statements (must exceed 7.5% of adjusted gross income)
- [ ] Unreimbursed Work Expenses (i.e. Union Dues)
- [ ] Charitable Contribution Receipts/Statements (cash or non-cash must be clearly stated)