

Tax Preparation Checklist provided by LL Consulting

LL Consulting has designed this checklist as your personal guide to compiling your tax documents. It is not a legal document; it may, however, save you time and remind you which tax documents you've accrued throughout the year. Returning clients will not need to provide basic data, *new clients need last year's return.*

Personal Data

- Name, Date of Birth, and Social Security Numbers for self, spouse, and dependents
- ATIN for adoptions in progress in lieu of SSN

Income

- W-2 forms - employer provided
- Alimony Received
- Dividend income (1099-DIV)
- Healthcare Reimbursement (1099-SA or 1099-LTC)
- Interest income (1099-INT)
- Retirement/Pension/IRA Income (1099-R)
- Social Security Income (1099-SSA, RRB-1099)
- Stock or Property Sales (1099-B, 1099-S)
- Unemployment Income (1099-G)
- Other Income (Jury Duty, Hobby, Prizes, Gambling, etc.)

Deductions

- Mortgage Interest (1098)
- Real Estate and Personal Property Taxes (Car)
- Cash donations to charity
- Non-Cash donations to charity
- Charitable mileage
- Medical Premiums paid out of pocket
- Medical Expenses, doctors, dentists, hospitals, pharmacies, etc.
- Medical mileage
- Employment-related expenses (dues, tools, uniforms, travel, etc.)
- Job-hunting expenses
- Tax Preparation fees
- Legal fees for tax related items

Credits

- Childcare costs (including provider name and EIN/SSN)
- Adoption expenses
- College tuition payments (1098-T)
- College supplies (books, computer, etc.)
- IRA Contributions
- Student Loan Payments (1098-E)

Rental Houses

- Amount paid by tenants for the calendar year
- Repairs, Maintenance, Supplies for the rental house
- Property Value for depreciation
- Mileage to maintain rental property
- Commissions/Management fees



1040 U.S. Individual Income Tax Return
For the year 2008, 2009, 2010, or other tax year beginning
Your & Your Spouse's total
If a joint return.

Label	Last name
	Last name