LivingstonCPA's Tax Checklist for Individuals

Form from: http://www.livingstoncpa.com/resources/IndividualChecklist.asp

Please use this list as a guide in gathering your information, complete it with your personal contact information below, and enclose it with your submission to me. Please provide any additional information related to income and expenses that may be required for your tax return.

- For new clients only - A copy of last year's Federal and State (if applicable) tax returns

Income Information:

- W-2s and Interest and Dividend statements (Form 1099-INT or 1099-DIV)
- Individual Retirement Account year-end statement, plus any contributions or withdrawals through April 15th of the year following the tax return year
- Unemployment income statements
- Trust, "S" corporation, and/or Partnership income amounts (Form K-1)
- Income and expenses from sole proprietorships
- Income and expenses for rental properties and number of days occupied for personal purposes and rental purposes.
- Details of any capital gains transactions, including cost basis and date of purchase (Sale info on 1099-B)
- Other income reported on 1099-MISC

Expense Information:

- Amounts of mortgage interest and points paid (Form 1098)
- Real estate taxes paid
- Charitable donations (both cash and non-cash) and mileage
- Out-of-pocket medical expenses and mileage
- Non-reimbursed employee business expenses
- Tax preparation fees and investment expenses
- Sales tax paid: If ALL receipts kept for all purchases during the year, total actual sales tax paid is deductible. If receipts are not kept (most people will fall into this category), the IRS table will be used to calculate the appropriate sales tax deduction (figured by paid preparer).
- If IRS tables are used, sales tax paid on a motor vehicle (including a car, motorcycle, motor home, recreational vehicle, sport utility vehicle, truck, van, and off-road vehicle), boat, aircraft, home (including a mobile or prefabricated home), and materials to build a home is deductible IN ADDITION TO the amounts deducted per the tables.

Other Information:

- Full name, date of birth, and social security number for all dependents
- Year-end market values of non-retirement asset accounts for intangible tax purposes
- Sale of home info - only if gain exceeds $250k (single) or $500k (married filing jointly) and/or you didn't live in it as your primary residence for at least two years

Note: Contact and tax return information on next page.

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Provide the following information related to the designated contact person for tax return purposes:

Full Name ______________________________

Occupation ______________________________

Name of Spouse ______________________________

Spouse Occupation ______________________________

Home Phone ______________________________

Alternate Phone ______________________________

Email Address ______________________________

Do you check email at least twice a week?	Yes	No
May LivingstonCPA send tax-related questions and correspondence via email?	Yes	No
In future years, may I send my annual tax mailer via email instead of paper mail?	Yes	No
Do you want to file your return electronically? If so, a paper copy will be given to you for your review prior to e-filing.	Yes	No
Do you want to have any refund direct deposited? If so, please enclose a voided check or deposit slip for the deposit account.	Yes	No

Please fax or mail completed form to:

LivingstonCPA
1335 Lakewood Road
Jacksonville, Florida 32207

(904) 887-7519 - Phone
(904) 398-6507 - Fax