Tax Services of Edinboro

Tax Checklist

Help us help you get the maximum refund possible!

When getting your taxes done, it is important to have complete information and documentation on hand for your appointment. At Tax Services in Edinboro, PA, we want to see you get the best refund possible. Therefore, we've put together a list of information needed to ensure you don't miss out on any possible deductions.

Please check through the following list and gather the information that applies to your specific life circumstances.

Your personal information:

___ Your social security number.

___ If married, you will need your spouse's full name, date of birth and social security number.

___ If you have dependents, you will need the full name, date of birth and social security cards for each of them.

Employment Information:

___ W-2 forms for all places worked.

___ 1099 form if you received unemployment or state tax refund.

___ 1099 form if you were employed as an independent contractor.

___ List of unreimbursed expenses related to your employment (Please organize your receipts chronologically).

___ Union Dues - Include the name of the union and the total amount paid for the year.

Other Income Received:

___ Amount of alimony received and ex-spouse(s) name(s) and Social Security Number(s).

___ Health care reimbursements (1099-SA or 1099-LTC).

___ Gambling Income (W-2G) or records such as receipts showing expenses and income from gambling.

___ 1099’s in addition to unemployment benefits, state tax refund, or self-employment, such as independent contractor 1099’s.

___ Prizes or awards.

___ Untaxed bonuses or commissions.

___ Jury duty records.

___ Income and expenses from hobby work.

Self-Employment Status:

___ Forms 1099-MISC, Schedules K-1.

___ Income records necessary to verify any income amounts not reported on 1099’s.

___ Records of all expenses.

___ Business equipment and asset information – needed for depreciation.

___ Home Office – Space and utility information, if applicable.

Childcare and Education Information:

___ Childcare records – must include the provider’s Tax ID # (or SSN if a private provider) and complete address.

___ Bills from educational institution or any other record that itemizes what you paid or received loans for.

___ Records of scholarships or fellowships .

___ Financial Aid received.

___ Forms 1098-T and 1098-E – (if received by you).

___ Records of student loan interest paid (applicable only while in school, if dependent).

Spouses, ex-spouses, right to claim child (ren) and other adults living in your home:

___ If currently married and not filing joint, you will need the approximate income of your spouse.

___ If there are currently other adults living in your home, you will need approximate income for them, also.

___ Amount of any alimony paid out and your ex-spouse's social security number.

___ Form 8332, copies of your divorce decree, or other documentation showing that your ex-spouse is releasing their right to claim a child or children to you.

Vehicle Information:

___ Vehicle starting and ending mileage for the year.

___ Total miles driven for the entire year.

___ Total of all business miles driven for the entire year ** Commute miles do not qualify.

___ Total of all parking and tolls paid and receipts.

___ If you choose to claim expenses instead of mileage, you will need receipts for gas, oil, car washes, licenses, personal property, lease or interest expense as well as the year, make and model of the car.

Savings and Investments:

___ Interest and/or dividend income from all accounts (1099-NT, 1099-OID, 1099-DIV).

___ Income records from sales of property, stocks or other sources (1099-B, 1099-S).

___ Records of property acquired or sold including dates and cost or gain.

Retirement/IRA Income and Information:

___ Retirement Pension, IRA, or Annuity income (1099-R).

___ Social security or RRB Income (1099-SSA, RRB-1099).

___ IRA total amount contributed for the previous year and current year if applicable.

___ Value of IRA's on 12/31/2011.

___ Traditional IRA basis.

Rental Property Income:

___ Complete records of all income and expenses for the year.

___ Rental asset (value) information for depreciation calculations.

___ Itemized Return (Allowable Deductions).

___ Forms 1098, any/all mortgage statements- interest paid.

___ Amount of state and local income taxes paid (if property owner prior to 2011).

___ Amount of state and local sales tax paid (if purchased during 2011).

___ Real Estate and personal property taxes paid for the entire year.

___ Vehicle sales taxes paid if new vehicle purchased in 2011.

___ Cash donations to houses of worship, schools and other charities.

___ Records of non-cash charitable donations including clothing or household items.

___ HUD statement showing closing date and amount of home purchase.

___ Mileage driven for medical purposes .

___ Mileage driven for volunteer/charitable purposes.

___ Any expenses related to investments.

___ Job-hunting expenses including printing, postage, or mileage.

___ Medical, Healthcare, Dentalcare, Eyecare Insurance expenses.

___ Out of pocket co-insurance or co-pays paid to doctors, dentists, hospitals, medical clinics.

___ Employment related expenses.