

TAX CHECKLIST OF THINGS TO GATHER FOR TAX RETURN- 2008

INCOME

W-2's

Interest Earned Statements (**1099I**)

Dividends Earned (**1099DIV**)

Family Members Names, Social Security Numbers, and Dates of Birth

I will only need changes since I already have the existing family members

Alimony Received or Paid

Unemployment Received

IRA & Pensions received (**W-2P** or **1099R**)

Social Security Received (Dividends/Capital Gains Distributions)

Any Other Income i.e. Jury Duty

Business Income/Expenses-Expenses broken down into categories, each category totaled See Page 2 of this flyer

Stock Sales (**1099B**) Records of when purchased and how much including # of shares and price per share

**IRA's funded by 4-15-08, specify traditional or Roth (Maximum contribution now \$5000; \$6000 if over age 50)

K-1's (S-Corps, Partnerships)

CHILD CARE

Name, Address, SS#, Amount Paid to EACH child care giver, preschool and summer camp tuition (new starting in 2006)

ITEMIZED DEDUCTIONS

Medical, Dental, and Long Term Care Premiums (Bills paid by you including prescriptions)

Long Term Care Costs

Contact Lenses, Glasses, Hearing Aids

State Income Taxes paid during Calendar Year

Property Taxes

Home Mortgage Interest & Points Paid (**Note: If you pay your mortgage to an individual, you must provide their name, address, & SS# on Schedule A)

Investment Interest

Donations-Cash & Property (i.e. Goodwill) must have a statement from non-profit organizations for any single donation over \$250

Theft Losses

Moving Expenses (Must move because of work; must have job **before** moving)

Employee Business Expenses (TEACHERS-Primary and Secondary education that work at least 900 hours can write off up to \$250 of out of pocket expense)

Energy Saving home improvements (i.e. windows, solar equipment,)

TUITION

Tuition paid (Yourself or Family member)
Student Loan Interest paid

RENTAL PROPERTY

Income

Expenses By Category

Advertising

Auto

Repairs

Insurance

Interest Paid

Property Taxes Paid

Management Fees

Legal/Professional Fees

Travel

Utilities

SMALL BUSINESS- If you don't see your category listed, tell me about it anyway. These are just the basic ones.

Income

Beginning & Ending Inventory-if applicable

Purchases

Advertising

Auto

Commissions/Fees

Insurance

Interest Paid

Legal/Professional Fees

Office Supplies

Postage

Rent or lease payments

Repairs/Maintenance

Supplies

Taxes/Licenses

Travel

Meals/Entertainment

Utilities

Wages

Other