SMITH'S TAX SERVICE

Your Peace of Mind is Our Family Business.

General Information Checklist

The following is a general checklist and may not apply to everyone. Whether you have an appointment or send your information to us, the following is needed.

- ⇒ All W-2 and W-2G forms for the year
- ⇒ All 1099 forms received, including (but not limited to) 1099 R, 1099 MISC, 1099 DIV, and 1099 INT, etc
- ⇒ State tax refunds
- ⇒ If you sold stock in the previous year, please contact us
- ⇒ All unemployment income
- ⇒ Social Security from SSA-1099
- ⇒ Alimony received or paid (if paid, the social security number to whom paid)
- ⇒ Money put into an IRA and a statement showing the fair market value
- ⇒ If you sold a house, please tell us when you call for an appointment or please call before dropping off your information
- ⇒ Form 1098 showing mortgage interest paid

For the following we need only the totals and not the actual receipts:

- ➢ Medical: prescriptions, dentists, nurses, health insurance, Physicians Mutual, hearing aids, dentures, eyeglasses, etc
- ➢ Real estate taxes paid
- ➢ Excise taxes paid on cars, trucks, boats, and campers
- ➢ Interest paid to an individual: we will need their name, address, and social security number (on mortgages)
- ➢ Contributions: cash and checks, and/or other than cash and checks
- ➢ Child dependent care expenses: name, address, and ID number of caretaker(s) (social security number or federal ID number)

- ✓ If you made estimated payments, please provide us with the amounts and the dates they were made.
- ✓ If you have long term health care insurance we need to see a copy of your policy, some of the premium may be deductible.

If you have children in college or you are attending college, please contact us. You may be eligible for one of the Learning Credits. You will need to provide us with Form 1098T