



**Fred P. Kreuzer**  
CPA & ASSOCIATES

## TAX PREP LIST

### First Time Client

- Social Security Number
- Date of Birth
- Driver's License
- Dependents' Names, Social Security Numbers and Dates of Birth
- Copy of Last Year's Return
- Plus Any Relevant Information From the Categories Below

### Everyone

- |   |  |
|---|--|
| <ul style="list-style-type: none"> <li><input type="checkbox"/> Driver's License</li> <li><input type="checkbox"/> W-2's from all Employers</li> <li><input type="checkbox"/> Tuition &amp; Education Fees (1098T)</li> <li><input type="checkbox"/> Commissions Received/Paid</li> <li><input type="checkbox"/> IRA and Roth IRA Contributions</li> <li><input type="checkbox"/> Charitable Contributions</li> <li><input type="checkbox"/> Lottery or Gambling Winnings/Losses (W-2 G)</li> <li><input type="checkbox"/> Medical &amp; Dental Expenses (including mileage)</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Health Insurance Premiums<br/>(including Forms 1095 A, B or C)</li> <li><input type="checkbox"/> Student Loan Interest (1098E)</li> <li><input type="checkbox"/> Estimated Taxes Paid with Dates Paid</li> <li><input type="checkbox"/> All 1099 Forms for other Income or Benefits<br/>(Pensions or Retirement Income 1099R, Social Security SSA-1099,<br/>Unemployment 1099G, Cancelled Debt 1099C, Sales of Stocks and Bonds 1099B,<br/>Interest and Dividend Income 1099 INT/1099DIV, State Refund 1099G)</li> </ul> |
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### If You Own a Personal Residence

- Mortgage Interest Statement (Form 1098)
- Real Estate Taxes Paid
- Closing Documents if You Bought or Sold During the Year
- Did you Refinance in 2016? If so, Bring all Mortgage Documents Old and New.

### If You Own Rental Property

- For Each Rental Property, Bring the Following:
- Rental Income
  - Receipts for all Repairs, Upgrades and Utilities
  - Mileage for Repairs, Inspections, etc.
  - Insurance Premiums
  - Real Estate Taxes Paid
  - Mortgage Interest Statement (Form 1098)

### If You Own a Business

- Business Income & Expenses
- List of Capital Assets & Equipment
- Mileage Log
- Tax Identification Number - If Applicable