



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

- | | |
|--|---|
| <input type="checkbox"/> Driver's License | <input type="checkbox"/> Health Insurance Premiums
(including Forms 1095 A, B or C) |
| <input type="checkbox"/> W-2's from all Employers | <input type="checkbox"/> Student Loan Interest (1098E) |
| <input type="checkbox"/> Tuition & Education Fees (1098T) | <input type="checkbox"/> Estimated Taxes Paid with Dates Paid |
| <input type="checkbox"/> Commissions Received/Paid | <input type="checkbox"/> All 1099 Forms for other Income or Benefits
(Pensions or Retirement Income 1099R, Social Security SSA-1099,
Unemployment 1099G, Cancelled Debt 1099C, Sales of Stocks and Bonds 1099B,
Interest and Dividend Income 1099 INT/1099DIV, State Refund 1099G) |
| <input type="checkbox"/> IRA and Roth IRA Contributions | |
| <input type="checkbox"/> Charitable Contributions | |
| <input type="checkbox"/> Lottery or Gambling Winnings/Losses (W-2 G) | |
| <input type="checkbox"/> Medical & Dental Expenses (including mileage) | |

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