

INDIVIDUAL TAX PREPARATION CHECKLIST

INSTRUCTIONS:

If this is your first year with Affiliated Tax Pros, please **include a copy of your most recently filed tax return.**

Include tax documents received from banks, employers, brokers, retirement, state governments and local governments including forms W2, W2G, 1098, 1098E, 1098T, 1099A, 1099B, 1099C, 1099DIV, 1099G, 1099INT, 1099LTC, 1099MISC, 1099MSA, 1099OID, 1099PATR, 1099R, 1099S, 1099SSA and K-1.

GENERAL:

Change of Address

Name, **date of birth**, SSN, and occupation of each new filer or dependent on the tax return

Are you or your spouse retired on permanent disability? *You:* YES/NO *Spouse:* YES/NO

Do you want \$3 to go to the Presidential Election Campaign fund? *You:* YES/NO *Spouse:* YES/NO
note: this money comes from the general fund to create resources for qualified presidential candidates.

If you expect a refund and would like to have it deposited directly into your bank account, provide a voided check or provide:

Bank Name _____ Account number _____ Routing number _____

Income:

Provide W-2's, broker statements and appropriate 1099's.

Business owners – Complete Business Checklist or provide K-1 (if ATP does not prepare your business tax return)

Provide w-2 and investment income for any dependent child up to the age of 19. And for children who are full-time students ages 19 through 23.

CREDITS AND DEDUCTIONS FOR ALL FILERS:

Dependent care expenses incurred to care for your child under 13 (or dependents who are incapable of caring for themselves) while you were working, searching for work or schooling. <i>Include documentation from care facility or individual and their tax identification number(s)</i>	\$
Educator expenses (Kindergarten through grade 12 teachers may deduct certain expenses paid out of pocket)	\$
Contributions to Health Savings Account	\$
Contributions to (circle one) IRAs and ROTH IRAs	\$
Date of Contribution	
Adoption expenses	\$
Student Loan interest paid (include forms 1098-E)	\$
Tuition and Fees Deduction or Credit (include forms 1098-T)	
Moving Expenses	\$
Real Estate Taxes paid – additional exemption for non-itemizers	
Penalty on Early Withdrawal of Savings (include forms 1099-INT and 1099-OID)	\$
Amount each taxpayer contributed to Retirement Plans (include documentation)	\$
Oregon political contribution credit (MFJ \$100, S/HH \$50 maximum)	\$

DEDUCTIONS FOR FILERS WHO ITEMIZE:

Medical expenses paid out of your pocket and not reimbursed by insurance or your employer: for a list of all deductible expenses please contact our office.	\$
State and Local Taxes paid (include 1099-G or local tax document)	\$
Real Estate Taxes (property tax) (include forms 1098 and local property tax documentation)	\$
Personal Property Taxes (auto, boat registration)	\$
Home Mortgage Interest and Points (include forms 1098) Did you refinance or take out a line-of-credit, if yes, was it to improve your home? Provide documents.	\$
If you sold or purchased a home in 2008 please provide all settlement documents.	
Investment Interest (include documentation)	\$
Expenses to produce and collect income (provide documentation)	\$
Expenses to conserve, manage and maintain investment property (include documentation)	\$
Legal and professional fees related to producing or collecting taxable income, doing or keeping your job, or getting tax advice	\$
Investment fees and expenses (specify and list on a separate sheet)	
Safe deposit box rental	\$
Trustee's fees for your IRA	\$
Gifts to Charity (list on a separate page, each charitable organization, its address, the amount donated and the date of the donation or if property was donated include a brief description, date of donation and the value of each item donated)	
Casualty or Theft Losses (provide a brief explanation or documentation for amounts not	

