

Helping Hand Accounting Services LLC

Cynthia L. Bopp, EA

List of Tax Preparation Documents

Taxable Income Forms, Documents

____ W-2 Form(s) for Wages, Salaries, and Tips
____ Interest Income Statements: Form 1099-INT & 1099-OID
____ Dividend Income Statements: Form 1099-DIV
____ Sales of Stock, Land, etc. for Capital Gains: Form 1099-B
____ Sales of Real Estate: Form 1099-S
____ State Tax Refunds: Form 1099-G
____ Alimony Received or Paid
____ Unemployment Compensation Received: Form 1099-G
____ Miscellaneous Income: Form 1099-MISC
____ Retirement Income: Form 1099-R
____ Social Security Income and Railroad Retirement Income: Form SSA-1099
____ Business Income and Expenses
____ Rental Income and Expenses
____ Farm Income and Expenses
____ Form K-1 Income from Partnerships, Trusts, and S-Corporations
____ Tax Deductible Miles Traveled for Business Purposes

Tax Credits

____ Child Tax Credit
____ Child Care Provider Address, I.D. Number for the Child and Dependent Care Credit
____ Child Care Expenses for Each Dependent
____ Earned Income Tax Credit (EITC)
____ Adoption Expense Information for the Adoption Credit
____ Foreign Taxes paid
____ First Time Home Buyer Tax Credit
____ Educational Expenses for You and Your Spouse
____ Dependents' Post High School Educational Expenses

Tax Deductions, Expenses

____ Medical Expenses for the Family
____ Medical Insurance Paid
____ Prescription Medicines and Drugs
____ Doctor and Dentist Payments
____ Hospital and Nurse Payments
____ Tax Deductible Miles Traveled for Medical Purposes
____ Home Mortgage Interest from Form 1098
____ Home Second Mortgage Interest Paid
____ Real Estate Taxes Paid
____ Total Rent Paid

_____ State Taxes Paid with Last Year's Return (if claiming itemized deductions)
_____ Personal Property Taxes Paid
_____ Charitable Cash Contributions
_____ Fair Market Value of Non-cash Contributions to Charities
_____ Unreimbursed Expenses Related to Volunteer Work
_____ Tax Deductible Mileage for Volunteer Purposes
_____ Casualty and Theft Losses
_____ IRA Contributions
_____ Student Loan Interest Paid

Tax Estimate Payments

_____ Estimated Tax Payments Made: Federal and State
_____ Last Year's Tax Return Overpayment Applied to This Year

General Information

_____ Copy of Last Year's Tax Return - if not prepared by us
_____ Social Security Numbers for You and Your Spouse
_____ Dependents' Names, Years of Birth, and Social Security Numbers
_____ Prior Year Adjusted Gross Income (AGI)
_____ Routing Transmit Number (RTN) (For direct deposit/debit purposes)
_____ Bank Account Number (BAN) (For direct deposit/debit purposes)