EA Williams & Company, Inc.
Certified Public Accountants

Required Items for Individual Tax Return Preparation

Income:

- Last year's Federal and State tax returns (if a new client this year)
- All forms W-2, 1099 (1099-INT for interest, 1099-DIV for dividends, 1099-B for sale of securities/stock, 1099-R for annuities and pensions, 1099-R for IRA or other retirement plan withdrawals, 1099-G for state tax refund, SSA-1099 for social security, 1099-G for unemployment and 1099-MISC for commissions or rental income)
- Copies of returns (Schedule K-1) for partnerships, S-Corporations and estates or trusts
- It you purchased, sold or refinanced your home or other property this year, a copy of your closing or settlement statement.
- If you made estimated tax payments, copies of payment vouchers and check information.

Deductions:

- Medical expenses and premiums paid of pocket.
- Real estate taxes paid (form 1098)
- Ad valorum tax paid (car registration)
- Mortgage interest paid (form 1098)
- Second mortgage or Home Equity Line of Credit interest paid
- Student loan interest paid
- Charitable contributions – either cash or non-cash
- Child care expenses – for second spouse to work. For each child, we need name of care provider, address, employer ID number or social security number and amount paid to each provider.
- If self-employed, expenses related to business, auto mileage and home office expenses (s.f. of home/s.f. of office area, mortgage interest or rent paid, property taxes, utilities, etc.)

295 W. Crossville Road, Suite 330
Roswell, GA 30075
770-650-0103   770-650-5743
www.cpatfp.com
email: asmith@cpatfp.com