



✓ CHECKLIST

Phone: 404-692-3637

Email: taxinfo@tristartax.net

Website: www.TriStarTax.net

BASIC INFORMATION:

- Taxpayer Questionnaire completely filled out
- Last year's tax return and amount paid for preparing the tax return (If NITS prepared your tax return last year, we already have that information for you)
- Social Security Numbers and birth dates for everyone on your tax return
- Valid ID (Driver License, State ID, or Passport)

FORMS:

- All forms that say W-2, 1098, 1099 or Schedule K-1
- Records for what you paid in mortgage interest, real estate and personal property tax
- Closing documents (such as the HUD Statement) for a home you just purchased
- Articles of Organization/Incorporation
- Business Expense & Rental Expense form

INCOME AND INVESTMENTS:

- Income & expense records for work you performed (not already shown on a W - 2 OR 1099)
- Record of other income and expenses (rental income and expenses, jury duty, gambling, hobby, home business, alimony income, etc.)
- Expenses related to your investments

CHARITABLE DONATIONS:

- Amounts donated to houses of worship, schools or other charitable organizations
- Amounts and records of non-cash charitable donations
Number of miles you drove for charitable purposes

DEDUCTIONS AND EXPENSES:

- Number of miles you drove for medical purposes, and amounts paid for health care (insurance, doctors, dentists, hospital, etc.)
- Record of childcare, higher education's cost, student loan interest
- Employment- related expenses (dues, travel, tools, uniforms, uniform cleaning, cell phone, etc.)