

# Tax Appointment Check List

- Last Year's Tax Returns,  
State and Federal.....
- W-2s.....
- Form 1099's from Banks,  
Brokerages for Investment Income .....
- Form 1098 Mortgage Interest .....
- Medical Expenses for the year, unless  
already used under a flexible  
spending program .....
- Dependent child care expenses, plus the name and  
SSN or EIN of your provider and the amount paid  
during year.....
- Charitable Contributions .....
- Car Registration and Tax Paid .....
- Unreimbursed business expenses or  
unreimbursed teacher's classroom expenses ....

- Records of any other employment, unemployment  
compensation or other sources of income  
(such as lottery winnings).....
- IRA Contributions .....
- Tuition Expenses (Form 1098T).....
- Gains/Losses on sale of stock with  
acquisition dates & stock basis .....
- Student Loan Interest .....
- Alimony paid or received .....
- Unreimbursed Moving Expenses .....
- Estimated tax payment amounts/ dates paid ...

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**If you are Self Employed, also provide:**

- List all business expenses categorized and  
receipts. If not exclusively for business  
purposes, determine the percentage  
business vs. personal expense .....
- Mileage driven for business purposes  
and total miles driven .....
- Assets acquired during the year.....
- Depreciation schedule or assets held.....
- Health Insurance Paid.....
- If using credit card for purchases,  
all statements with purchase descriptions .....
- Bank Statements for year .....
- Log of meals and/or entertainment.....

- Names and SSN/EIN of independent  
contractors that you paid \$600  
or more in the tax year .....
- Square footage of home office  
and square footage of entire home .....
- Utility Bills.....
- Insurance Bills .....
- Property Tax Bill  
(for house or business building) .....
- If selling a tangible product,  
inventory value at the beginning of the year  
and the end of the year.....
- Payroll information on any  
employees you have .....

*This list is to be used as a guide, and is not all-inclusive. If you have questions about any of these items, please give us a call at (704) 385-1040, or email [info@proctortaxprep.com](mailto:info@proctortaxprep.com).*