

McCormick Braun Friman, LLC

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2009 Tax Preparation Checklist

Personal Information

- Full Name, Address, Phone Number and email.
- Social Security Numbers, including spouse and children as well as dates of birth
- Bank Name, routing number and account number

Employment & Income Information

- Last Year's Tax Return, **if not prepared by this office**
- W-2 Forms
- Forms 1099-G, Miscellaneous Income, Including Rent
- Schedules K-1, Partnership, S Corporation, and Trust Income
- Forms 1099-R, Pensions and Annuities
- Forms RRB-1099, Social Security/ RR1 Benefits
- Alimony Received
- Jury Duty Pay
- Gambling and Lottery Winnings
- Prizes and Awards
- Scholarships and Fellowships
- Forms 1099-G, State & Local Income Tax Refunds

Homeowner & Renter Information

- Residential Addresses
- Form 1098, Mortgage Interest; please include the address of property and real estate taxes paid
- Form 1099-S, Sale of your Home or other Real Estate; include the purchase date and price
- Closing statement for any homes purchased in the year
- Interest Paid on a Second Mortgage
- Moving Expenses

Financial Assets

- Form 1099-INT & 1099-OID, Interest Income Statements



- Form 1099-DIV, Dividend Income Statements
- Form 1099-B, Proceeds from Broker Transactions; **including basis figures (purchase date & purchase price, sale date & sales price)**
- Form 1099-R, Retirement Plan Distribution
- Brokerage Statements from stock, bond or other investment transactions

Financial Liability

- Loans & Leases for Automobiles (if used for the company's business)
- Loan Interest Paid on Student Loans
- Penalties for Early Withdrawal on CDs or other timely deposits

Expenses

- Donations, including name of charity, date donated, items donated and amount
- Volunteer Work Expenses that are not reimbursed
- Work Expenses that are not reimbursed
- Investment Expenses
- Job Search Expenses
- Job-Related Education Expenses
- Child Care Expenses (include provider name, address, tax identification number or social security number)
- Medical Expenses
- Adoption Expenses
- Alimony Paid (include name and social security number)
- Tax Return Preparation Expenses

Self- Employment Information

- Forms 1099-Misc, Business Income
- Schedules K-1, Partnership SE Income
- Receipts or other business-related expenses
- Receipts or other farm related expenses
- Employment Taxes & other Business related taxes for the current year
- Payment Records

Other Supporting Tax Documents

- Federal, state & local estimated income tax paid for current year
- Tax vouchers, cancelled checks & other payment records

- IRA, Keogh and other retirement plan contributions
- Records to document casualty or theft losses
- Records for any other expenses that may be deductible
- Records for any other revenue or sales of property that may be taxable
- Credit card and bank statements

Once these documents are received, email, mail or drop off the documents at our office and we will get started on the return (s) right away. Should you have any questions, feel free to send us an email at jessica@mbflegal.com, or call us at (312) 327-3402.