

**Personal
Information**

Your social security number
Your spouse's full name and social security number
Amount of any alimony paid and ex-spouse's social security number
Your last 3 years' tax return(s). Your Tax Professional can check them for accuracy

**Other people
who may
belong on your
return**

Dates of birth and social security numbers
Childcare records (including the provider's ID number) if applicable
Approximate income of other adults in your home (not spouse, if you're filing jointly)
Form 8332, copies of your divorce decree, or other documents showing that your ex-spouse is releasing their right to claim a child to you (If Applicable)

**Health
Insurance**

Proof of Private Insurance, if insured through employer
Form 1095A - From Health Insurance Marketplace (ObamaCare)
Marketplace granted exemption Certificate Number.

**Education
Payments**

Bills from the educational institution or anything else that itemizes what you paid or received loans for versus what was covered by scholarship or other financial aid
Forms 1098-T and 1098-E, if you received them
Scholarships and fellowships

**Employee
Information**

Forms W-2

**Self-
Employment
Information**

Forms 1099-MISC, Schedules K-1, income records to verify amounts not reported on 1099s.
Records of all expenses – check registers or credit card statements, and receipts
Business-use asset information (cost, date placed in service, etc.) for depreciation
Office in home information, if applicable

**Vehicle
Information**

Total miles driven for the year (or beginning/ending odometer readings)
Total business miles driven for the year (other than commuting)
Amount of parking and tolls paid
If you want to claim actual expenses, receipts or totals for gas, oil, car washes, licenses, personal property tax, lease or interest expense, etc.

Rental Income	Records of income and expenses Rental asset information (cost, date placed in service, etc.) for depreciation
Retirement Income	Pension/IRA/annuity income (1099-R) Social security/RRB income (1099-SSA, RRB-1099)
Savings and Investments	Interest, dividend income (1099-INT, 1099-OID, 1099-DIV) Income from sales of stock or other property (1099-B, 1099-S) Dates of acquisition and records of your cost or other basis in property you sold
Other Income	Unemployment, state tax refund (1099-G) Gambling income (W-2G or records showing income, as well as expense records) Amount of any alimony received and ex-spouse's name Health care reimbursements (1099-SA or 1099-LTC) Jury duty records Hobby income and expenses Prizes and awards Other 1099
Itemizing Deductions	Forms 1098 or other mortgage statements Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid Real estate and personal property tax records Invoice showing amount of vehicle sales tax paid HUD statement showing closing date of home purchase Cash amounts donated to houses of worship, schools, other charitable organizations Records of non-cash charitable donations Amounts paid for healthcare insurance and to doctors, dentists, hospitals Amounts of miles driven for charitable or medical purposes Expenses related to your investments Amount paid last year for preparation of your tax return Employment-related expenses (dues, publications, tools, uniform cost and cleaning, travel) Job-hunting expenses
IRA Information	Amount contributed for last year (and for current year, if applicable) Traditional IRA basis Value of IRAs on Dec. 31st



BUSINESS TAX PREPARATION CHECKLIST

Telephone: (407) 344-1012
1016 E. Osceola Pkwy Kissimmee, FL 34744
www.freedomtaxaccounting.com

General

Prior Year Corporate Tax Return
If first year, copy of IRS EIN Letter, or documentation of filing requirement.

Income

Gross receipts from sales or services
Sales records (for accrual based taxpayers)
Beginning inventory (if applicable)
Ending Inventory (if applicable)
Items removed for personal purposes (if applicable)
Returns and allowances
Business checking and savings account interest (1099-INT or statement)

Transportation and Travel Expenses:

Local Transportation	Business trip (mileage) log Contemporaneous log or receipts for public transportation, parking and tolls.
----------------------	--

Travel away from home	Airfare or mileage (actual expense if drove) Hotels Meals and tips Taxes and tips Internet connection (hotel, Internet café, etc.)
-----------------------	--

Additional Expenses:

Advertising

Commissions paid to subcontractors	File Form 1099-MISC and 1096 as necessary
------------------------------------	---

Depreciation Cost and acquisition date of assets
Sales price and disposition date of any assets sold

Fringe benefits Employer-paid pension/profit sharing contributions
Employer-paid HSA contributions
Employer-paid health insurance premiums
Cost of other fringe benefits

Business insurance Casualty loss insurance
Errors and omissions
Other

Interest expense Mortgage interest on building owned by business
Business loan interest
Legal fees

Office supplies Pens, paper, staples, etc.
Other consumables

Rent expense Office space rent
Business-use vehicle lease expense
Other

Office-in-home Square footage of office space (hours of use for daycare business)
Total square footage of home (not applicable for daycare business)
Mortgage interest or rent paid
Utilities

Wages paid to employees Form W-2 and W-3 Federal and state payroll returns (Form 940,
etc.)

Other expenses Repairs, maintenance of office facility, etc.