



CAROLINA TAX PROFESSIONALS

WHEN YOU ARE IN NEED OF AN ACCURATE, ETHICAL & KNOWLEDGEABLE TAX PROFESSIONAL

RALEIGH * DURHAM * CHAPEL HILL * CHARLOTTE * FAYETTEVILLE * GREENSBORO
AND SURROUNDING AREAS

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TAX PREPERATION CHECKLIST

- Last year's tax return (*If we did not prepare them*)
- W-2's ALL
- 10-99s
- IRA Distribution statement 1099R
- Unemployment statement 1099G
- Mortgage interest statement
- Real Estate property taxes paid
- PMI mortgage insurance paid statement
- New purchase home Closing Statement
- Student Loan interest statement
- Tuition paid for education
- Bank interest statement
- Interest received from dividends/stocks
- Vehicle property tax \$ _____
- Child care expenses \$ _____
- Charitable donations \$ _____
- Church donation \$ _____
- Medical expenses \$ _____
- Dental expenses \$ _____
- Medical miles # _____
- Child daycare statement
- Gambling lose statement
- Fire lost to personal items \$ _____
- Cost of last year tax preparation \$ _____
- Moving expenses \$ _____
- Miles from old home to new job # _____
- Miles from new home to new job # _____
- Unreimbursed work expenses \$ _____
- Education/tuition expense statement from your school
- Education expenses \$ _____
- Cost of last years tax preparation if they were not prepared by Carolina Tax Professionals \$ _____

- Other \$ _____
- Other \$ _____
- Other \$ _____
- Other \$ _____
- Other \$ _____
- Other \$ _____
- Other \$ _____
- Other \$ _____
- Other \$ _____
- Other \$ _____
- Other \$ _____
- Other \$ _____
- Other \$ _____
- Other \$ _____
- Other \$ _____

This worksheet provides a way for you to organize your credit and deduction information only. Whether or not an item is listed on this worksheet is not necessarily an indicator of whether an item is taxable or deductible. Tax regulations change often, and specific circumstances may determine whether any item is relevant to your situation. This worksheet cannot substitute for tax knowledge or professional tax advice. Please contact Carolina Tax Professionals at 919-730-6536, email at carolinataxpro@carolinataxpro.com or visit our website at www.carolinataxpro.com with any specific questions or to book your tax appointment.

I hereby verify that the information provided on this worksheet is accurate and complete. I understand it is my sole responsibility and my continuing obligation to include all information concerning deductions and other information necessary for the preparation of my personal income tax return. **I have not overstated these deductions and acknowledge that false information on a tax return could constitute a federal crime.** I do not hold Carolina Tax Professions or its tax preparers responsible for validating these expenses & deductions.

Signature _____

Date _____

- Other \$ _____
- Other \$ _____