

CHECKLIST

*Information needed for
Tax Appointment*



**845 E Warner Road, Suite 100
Chandler, AZ 85225
Office: 480-775-3887 * Fax 480-775-4013**

INCOME STATEMENTS

- ☐ All W-2 Forms
- ☐ Bank Interest & Dividends Earned
- ☐ Amount of State Refund or Payment
- ☐ Pension and/or IRA Distributions
- ☐ Gambling Winnings (or Loss) Statements
- ☐ Unemployment Compensation
- ☐ Social Security Statements
- ☐ Stock Transaction & Cost Basis Reports
- ☐ Sale of Your Home or Real Estate
- ☐ Native American Per Capita Income Statement

EXPENSE STATEMENTS

- ☐ Medical Expenses: Doctor, Dentists, Prescription & Hospital Co-pays, Post-Tax Insurance Premiums Paid
- ☐ Sales Tax paid on Large purchase items (car, etc.)
- ☐ Vehicle Registration Fees
- ☐ Real Estate Taxes
- ☐ Mortgage Interest Paid
- ☐ Closing Papers—Home purchase or Refi (HUD-1)
- ☐ Cash & Non-Cash Charity Receipts
- ☐ Tax Preparation Fees Paid
- ☐ Non-Reimbursed Work-Related Expenses
- ☐ Child Care Expenses
- ☐ Student Loan Interest Paid
- ☐ Investment Expenses
- ☐ Job-Hunting Expenses
- ☐ Adoption Fees
- ☐ Alimony Paid
- ☐ IRA or Other Retirement Plan Payments
- ☐ Moving Expenses
- ☐ AZ State Schools/Working Poor Tax Credit Receipts

SELF-EMPLOYMENT DATA

- ☐ Business Income (1099-Misc or 1099-K, Personal Records)
- ☐ Partnership (Sch.K-1) Income
- ☐ Business Related Expenses-TOTALS by Category
- ☐ Employment and other Bus. Taxes Paid

RENTAL PROPERTY DATA

- ☐ Rental Income Received
- ☐ Mortgage Interest Paid
- ☐ Real Estate Taxes Paid
- ☐ Renovation and Repair Costs
- ☐ Homeowner Association Dues
- ☐ Homeowner Insurance Paid

PERSONAL INFORMATION

New address / Telephone Numbers/E-mail

New client: Names, Social Security cards, DOB's of all family members. **Current Client:** new family member NAMES, Social Security cards, DOB's

Earned Income Credit (EIC) eligibility documentation:

Qualifying child:

- Birth certificate showing parent(s)
- Paperwork establishing niece/nephew relationship
- proof of living in home over half the year

Residency of Qualifying Child(ren):

- School records or statement
- Placement agency statement
- Landlord statement
- Medical records

Disability of Qualifying Child(ren):

- Doctor statement
- Healthcare provider statement
- Social services agency statement

Documents confirming business income:

- Business license
- Forms 1099
- Records of gross receipts
- Taxpayer summary income
- Records of expenses
- Bank statements
- Reconstruction of income and expenses

**Take a look at our website
www.sunincometax.com for
additional information.**

☐ NEW CUSTOMERS BRING COPY OF PRIOR YEAR RETURN

☐ Copy this form for your family, friends and co-workers—Refer a friend