Tax Appointment Checklist

- Form W-2’s (wages, etc.)
- Last pay check stub for the year
- Statements for Social Security or unemployment income
- Form 1099 (interest, dividends, etc.)
- Form 1098 (mortgage interest) and property tax statements
- List of all estimated payments including date, amount and taxing authority (IRS, Ohio, School District or City)
- Documents pertaining to sale of stock in 2008, including the cost basis and trade details.
- Documents pertaining to receipt of investment distribution (IRA, 401(k), etc.)
- Schedule K-1 (income/loss from partnerships, S Corporations, LLC, etc.)
- Brokerage statements from stock, bond or other investment transactions
- Closing statements pertaining to real estate transactions (HUD Form 1)
- All other supporting documents (schedules, checkbooks, etc.)
- Any tax notices received from the IRS or other taxing authority
- Totals for charitable donations - if over $250.00 refer to the Deductible Contributions Requirements and Valuation Guide on our website (www.wracpas.com)
- Unreimbursed business expenses, including mileage
- Statements pertaining to any additional income (bank interest)
- Stimulus amount received in 2008
- Social Security cards for new dependents

Schedule C clients:

- Please bring summary documentation of income and expenses relating to your business

Schedule E clients with Rental Property:

- Street address plus a summary of expenses and income from each individual property

New clients:

- Please bring a copy of last year’s tax return, including federal, state, local and school district