

Struck Tax Service
10992 E. M-55, Cadillac, MI 49601
(231) 775-9804
strucktaxservice.com

Tax Appointment Checklist

- _____ Social Security Cards
- _____ Wage Statements – form W-2
- _____ Pension or Retirement Income – 1099R
- _____ Interest & Dividend Income – Form 1099-Int / Form 1099-Div
- _____ State Income Tax Refund Amount – Form 1099-G
- _____ Social Security Income – Form 1099-G
- _____ Unemployment Income – Form 1099-G
- _____ Commissions Received
- _____ Commissions Paid
- _____ Sales of Stocks or Bonds – Form 1099-B
- _____ Dates of acquisition and records of your cost or other basis in property you sold
- _____ Self-Employment Business/Farm Income & Expenses – Form 1099 Misc.
- _____ Records of all expenses – check registers, etc
- _____ Lottery or Gambling Winnings – Form W-2G
- _____ Miscellaneous Income: Jury Duty Pay, Prizes, Awards, etc.
- _____ Income & Expenses from Rentals
- _____ Income from Partnerships, S Corporations, Trusts, and Estates – Sch. K

IRA Information

_____ Amount contributed for 2006 and 2007, if applicable

_____ Traditional IRAs

_____ Value of IRAs on 12-31-06

_____ Child Support paid/received

_____ Child Care Expenses & Provider Information

Itemizing Deductions

_____ Medical, Eye Care, Dental, and Mileage Expenses

_____ Real Estate Taxes

_____ License Plates Fees

_____ Mortgage or Home Equity Loan Interest Paid – Form 1098

_____ Cash and Non-Cash Charitable Donations

_____ Records of Purchases or Sale of Real Residence

_____ Expenses related to your investments

_____ Tax preparation fees

_____ Employment-related expenses (dues, publications, tools, uniforms cleaning, travel)

_____ Job hunting expenses

_____ Moving Expenses

_____ Un-reimbursed Employment –Related Expenses

_____ Job-Related Educational Expenses

_____ Educator Expenses

_____ Tuition and Education Feed – Form –T

_____ Student Loan Interest –Form 1098-E

_____ Casualty/Theft Losses

_____ Estimated Taxes

_____ Foreign/Other Taxes Paid

_____ State and Local Tax Payments

_____ Other Interest Paid

_____ Bank account number and routing number for Direct Deposit

Other information or questions :

Thank you for using Struck Tax Service!