

**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 :

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**Thank you for using Struck Tax Service!**