

# MATERIALS LIST-INDIVIDUAL-2010

The following is provided as an aid to gathering your information for the tax season. Please note that this is intended as a reminder and not necessarily a complete list.

- \_\_\_\_\_ 1. All copies of W-2 and K-1 Forms.
- \_\_\_\_\_ 2. All year end lender loan statements including those refinanced or paid off during the year. (Form 1098) NOTE-NOT ALL MORTGAGE INTEREST IS DEDUCTIBLE!
- \_\_\_\_\_ 3. Escrow Statements if not already provided.
- \_\_\_\_\_ 4. Landlord's name and address and amount paid for 2010, if applicable.
- \_\_\_\_\_ 5. All 1099 Forms, i.e, 1099R, 1099B, 1099 INT, 1099 DIV, Etc. Please provide complete year end broker statements.
- \_\_\_\_\_ 6. Social Security benefit report (if applicable).
- \_\_\_\_\_ 7. Social Security numbers of all new dependents.
- \_\_\_\_\_ 8. Auto excise taxes, real estate taxes and sales taxes paid this year.
- \_\_\_\_\_ 9. List of charities separated by cash/non cash-NEW TOUGHER RULES THIS YEAR-MUST HAVE DOCUMENTATION!
- \_\_\_\_\_ 10. Schedule summarizing business or rental income and expenses, if applicable.
- \_\_\_\_\_ 11. **Date and amount of each 2010 estimated tax payment.**
- \_\_\_\_\_ 12. Name, Address, and Social Security or I.D. number of all child care providers.
- \_\_\_\_\_ 13. List of employee business expenses, teacher expenses, and office at home expenses.
- \_\_\_\_\_ 14. If claiming business use of your personal vehicle, please bring your completed mileage statement-see our website for blank form.
- \_\_\_\_\_ 15. IRA's, Roths, etc. we will need to know of any contributions and/or withdrawals that were made and the nature of the withdrawal, if applicable.
- \_\_\_\_\_ 16. Stock trades, in addition to the 1099 forms (Item 5), you need to provide a schedule detailing shares sold, date of sale, name of entity, date of purchase and cost including commissions.
- \_\_\_\_\_ 17. MA Form 1099 HC – Health Care Form has information required on your MA Return- **We need all forms.**
- \_\_\_\_\_ 18. **Any other documents you feel may be of use regardless of its relevance.**