



SMITH FINANCIAL SERVICE

Efficient and Affordable

732-388-9850

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Paperwork Checklist

Please review this checklist to ensure you have all the information you will need to provide to your tax preparer. If you have questions, please feel free to contact Smith Financial Service at (732) 388-9850.

- W-2 FORMS FOR ALL JOBS WORKED
- FORM 1099-INT - BANK / CREDIT UNION INTEREST
- FORM 1099-DIV - STOCK DIVIDENDS
- FORM 1099-R - PENSION/RETIREMENT INCOME
- FORM 1099-SSA - SOCIAL SECURITY/DISABILITY INCOME
- FORM 1099-MISC - INDEPENDENT CONTRACTORS
- SCHEDULE C - INCOME & EXPENSES FOR SOLE PROPRIETORSHIPS & SOLE MEMBER LLCs
- SCHEDULE D - FORM 1099-B -SECURITIES SALE / COST BASIS (NOT ALWAYS ON THE FORM)
- SCHEDULE E - INCOME & EXPENSES FOR RENTAL PROPERTY
- SCHEDULE K-1
- FORM W 2-G - GAMBLING WINNINGS
- ALIMONY PAID / RECEIVED
- STUDENT LOAN INTEREST
- IRA CONTRIBUTIONS
- OUT OF POCKET COLLEGE COSTS
- DEPENDENT CARE EXPENSES
- MEDICAL EXPENSES
- SALES TAX - MAJOR PURCHASES
- PROPERTY TAXES PAID ON PRINCIPLE AND SECONDARY PROPERTY
- MORTGAGE INTEREST ON PRINCIPLE AND SECONDARY PROPERTY
- CHARITABLE CONTRIBUTIONS -MUST BE ABLE TO DOCUMENT !!!
- UNREIMBURSED EMPLOYEE EXPENSES TRUCK AND AUTOMOBILE MILEAGE FOR LAST YEAR
- ODOMETER READING (IF APPLICABLE)
- JOB SEARCH EXPENSES
- IF YOU PURCHASED A HOME IN LAST YEAR, BRING IN YOUR HUD STATEMENT