

**INFORMATION CHECKLIST
COMMON ITEMS NEEDED FOR TAX RETURNS**

- ___ Completed organizer or business, rental, and deduction statements, whichever may apply to your situation (**download from www.sonlehome.com**)
- ___ W-2s from all employers, and 1099-MIS from all payers
- ___ **New clients:** Last year Federal and state income tax returns.
- ___ 1099s for: interest, dividends, IRAs, retirement income, social security benefits, disability, unemployment, gambling winnings, cancelation of debt etc.
- ___ Void check for bank accounts if you wish direct deposits of your refunds.
- ___ Income information for children, and tuitions payments for higher education or 1098-T
- ___ For Dependent Care Credit: providers' names, addresses, Tax I.D, and phone number.
- ___ For taxpayers who itemize: home mortgage interest for all loans (Form 1098s), and property tax statements, total sum of check and cash donations, acknowledgements of other goods given. For donation of vehicles worth over \$500, Form 1098-C or written acknowledgement.
- ___ Copies of K- Is from LLCs, partnerships, S-corporations, estates and trusts. Be sure to inform us if you expect a new K-1.
- ___ If you bought, sold, or re-financed real estate, provide final closing statement for each transaction. If you were subject to CA back up withholding, please provide a statement. For foreclosure, short sales real estate, provide form 1099-A or Lender's final statement.
- ___ For stocks sold: date of sales, sales prices, date of purchase, purchase prices or cost basis. Complete the Schedule D1 if many trades were done during the year.
- ___ For business cars: provide total miles driven, commuting miles driven, parking & tolls, and business miles driven from your mileage log and interest paid on business vehicles.
- ___ For business cars using actual expense method: gas & oil expenses, insurance, tires, repairs, parking & tolls, car washes, memberships in road towing services & total mileage plus business mileage. Provide lease agreement and/or interest paid if applicable.
- ___ Copies of any correspondence received during the year from Federal or State tax authorities.
- ___ Copies of invoices for purchases made over the internet, or out of the state or country, for which you did not pay California Sales Tax.
- ___ If electing sales tax deduction instead of state income tax deduction: proof of sales tax paid on automobiles, aircraft, boats, home construction/remodel.
- ___ Legal documents for the formation, sale, or purchase of a business during the year.