

TAX PREPARATION CHECK LIST

Personal Items:

Name: _____

Address: _____

Phone Numbers: _____

- Last two years of Tax Return
- Personal Info of members of the household:

| Full Names | Date of Birth | Social Security Numbers |
|------------|---------------|-------------------------|
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |

- Was everyone in the household covered all year by Health care: ____ Yes or ____ No
(if no, what were the gaps? List by person and months)
- W-2's and earning statements for everyone it applies to
- Dividend, interest and stock transactions—the annual statements from the bank or brokerage firm
- Health insurance paid personally
- Mortgage interest, Property Taxes
- Cash and Non-Cash contributions
- Child care expenses (name of place, address, federal ID# and amount paid)
- College and Tuition (provide 1098-T issued by institution)

Mary Kay Items:

- Year End Statement from Mary Kay (Intouch: Business Tools– My Business-Reports-Income Advisory Statement)
- 1099 from Mary Kay (if applicable)
- Dayna's Tax Preparation Sheet



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