



Income Tax Preparation Documents Checklist

- q All your (and your spouse's) Wage and Tax Statements (W-2)
- q All your 1099 forms that you received from Banks or Investments
- q If you bought and/or sold real estate, the (HUD-1) Settlement Statements
- q Mortgage Interest and points paid (Form 1098)
- q Your Keogh, or IRA contributions for the tax year
- q County Personal Property Taxes paid
- q Real Estate Taxes paid
- q Any estimated taxes paid
- q Residency change - if you moved to/from another state: date of move
- q Social security numbers for everyone (you and your dependents)
- q Your childcare provider's name, address and federal ID
- q If you own a rental property, related income and expense information
- q A detailed list of Charitable Donations (cash & non-cash items) w/ estimated values
- q Non-reimbursed Business Expenses (ex: continuing education, computer, travel...)
- q Do you make energy efficient improvements to your house? Bring receipts and a description of the purchase
- q If you sold any stocks, the date you sold them, your proceeds, AND when you acquired the stocks and what their average cost basis was.
- q Major Theft or Casualty Loss
- q Major Medical or Dental Expenses
- q Voided Check (for electronic filing refund account verification)
- q If self employed – Income, expense, and equipment purchased info
- q If we didn't do your taxes last year, please bring a copy of your prior year federal and state tax returns for us to review



Need Directions?

From 395

- Take the King Street (Route 7) Exit #5 West
- King Street becomes Leesburg Pike. Go about 1 mile.
- Turn left onto George Mason Drive
- Take a right at the 2nd traffic light, and go up the hill
- Turn left at the stop sign into the Visitor Parking lot, then take a right and proceed to the end of the lot.
- We're in Skyline Building One, 5205 Leesburg Pike
- Take the elevator to the 2nd floor. We're in suite 213

- DO NOT PARK in front of the building in the Skyline Health Club slots as THEY WILL TOW you.

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