

The Tax Appointment Worksheet is a tool to help you gather the needed information.

	Event	Documents or Information Needed
1	Married, Divorced, or Separated in 2015	Married-prior year return of both spouses Divorced-copy of the divorced decree Separated- copy of the separated maintenance Agreement
2	Birth or adoption	Social Security cards and adoption papers
3	Death of child or spouse	Date of Death
4	Additional members of household	Date of occupancy and relationship
5	Job Change	Start Date Name of Employer W-2's from new and old employers
6	Unemployment	unemployment form
7	Retirement contribution	Type of plan- Amount of Contribution
8	Retirement distributions	Form 1099-R
9	Social Security benefits	Form 1099-SSA
10	Sale of stocks, bonds, etc.	Form 1099-B or other sale documents; basis or original costs
11	Purchase of stocks, bonds, etc., personal residence, or other real estate	Purchase documents, closing papers
12	Inheritance	Will; K-1 from the estate
13	Trade any property	Date of trade, property given up and property received or closing papers basis and FMV qualified intermediary sales agreements
14	Start or end a small business	Formation or termination dates Property contributions or distributions
15	Lawsuits settlements	Date received, reason for the settlement, 1099 MISC
16	Rental property	Income, expenses, new property purchased HUD statements
17	Prizes	Form 1099 MISC, value of prizes not included on form 1099 MISC
18	Lottery or gambling winnings	Total amount won whether on W-2G or not; total amount of losses
19	Health insurance, medical, dental, drug expenses medical miles(23.5)	Health insurance premiums, post-taxed payments totals of other medical, dental, and drug expenses. If the health insurance is pre-taxed (i.e. cafeteria plan, sec. 125,POP), premiums have already been deducted from the wage Total miles driven
20	State taxes income, property taxes paid, sales tax paid on vehicles, motorcycles or homes	Prior year's income tax return, property tax bills, closing papers from the purchase or sale of property, letter from the state regarding any change in a prior filed return
21	Purchase or refinance a home.	Closing papers from purchase, forms 1098
22	Charitable contributions of money, property, or out-of-pocket expenses Charitable miles (14 cents per mile) Transfer of IRA to charity	Date and type of contributions, knowledge that receipts from the organizations have been received, mileage log for charitable work total miles driven Brokerage statement showing transfer
23	Job-related expenses Business miles (56 cents per mile)	Meals, lodging, and miscellaneous expense amounts for items related to employment Total miles driven, business miles per vehicle
24	Educational or student loan interest expenses	Form 1098-T for parents or children, interest record for students loans, If the child is a student, the form will come to the child
25	Child or disabled spouse care	The name, address, and 10 number of the day care provider, the amount paid to the provider, If the provide come into your home, a W-2 may be required
26	Energy credit	Information regarding the purchase of qualifying vehicle, windows doors, furnace solar, or other energy upgrades.
27	Bankruptcy filing	Date Filed
28	Debt forgiveness or abandonment of property	Form 1099-A for abandonment form 1099-C for cancellation