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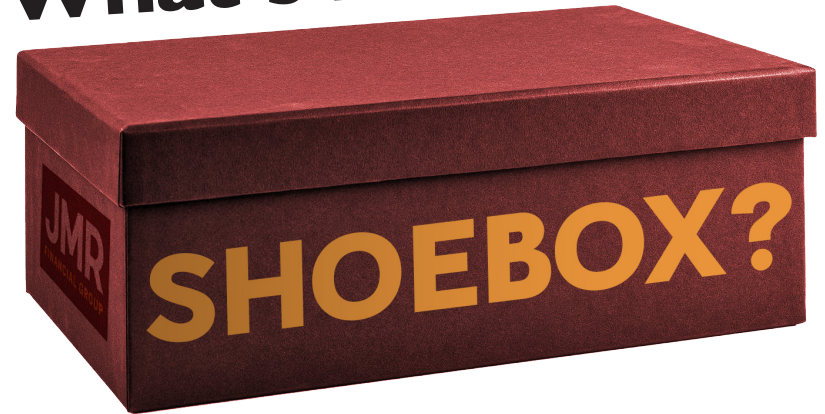


ONE FIRM - ONE FOCUS
To Increase Your Net Worth

1225 Tower Avenue, Suite 305
Superior, WI 54880

715-392-0202
Tax@JMRFG.com
www.jmrfg.com

What's In Your



YOUR TAX RETURN
Handy Checklist

Use this convenient checklist to ensure that you will have all the necessary documents needed for your tax preparer to complete your tax returns accurately and quickly.

BROUGHT TO YOU BY:



Check off the documents you need when you obtain them.

Personal Data

- Social security numbers (including spouse and children)
- Birth dates of taxpayer, spouse and dependents
- Copy of prior year tax return
- First and last names of taxpayer, spouse and dependents
- Taxpayer contact phone and email information
- Taxpayer and spouse occupation
- Filing status

Income Data and Statements

- W-2 forms
- K-1s from s-corporation, partnership and trusts
- Alimony received
- Jury duty pay
- State and local income tax refund
- Scholarships and fellowships
- Prizes and awards
- Gambling and lottery winnings (form W2 G)
- Interest income statements (form 1099-INT & 1099-OID)
- Dividend income statements (form 1099-DIV)
- Income tax refunds and unemployment compensation (form 1099-G)
- Proceeds from broker transactions (form 1099-B)
- Miscellaneous income (form 1099-MISC)
- Retirement plan distribution (form 1099-R, RRB 1099)
- Social security statements (Form SSA-1099)
- Debt cancellation

Home and Rental Property Data

- Sale of home or other real estate (form 1099-S)
- Rental property income
- Rental property expenses

Deductions and Expense Documentation

- IRA, SEP, SIMPLE or other retirement plan contributions
- Casualty and theft losses
- Medical savings accounts
- Energy efficiency improvements
- Child care including amount paid, provider name, tax I.D. or social security number and address
- Alimony Paid, recipient name & social security number
- Charitable donations
- Unreimbursed business or volunteer work expenses
- Child care expenses
- Student loan interest paid
- Tax return preparation fees
- Investment expenses
- Education expenses
- Job-hunting expenses
- Adoption expenses
- Moving expenses
- Medical expenses including health insurance paid
- Estimated tax payments made

Self-Employment Data

- Receipts & documentation for all business related income and expenses
- Vehicle mileage log
- Home office square footage