



Johnson Financial Services

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TAX RETURN CHECKLIST

The following is a list of items needed in order to prepare your income tax returns:

- All tax forms delivered to you:
 - W-2's (from employers)
 - 1099's (from financial institutions or contractors)
 - K-1's (from partnerships and S-Corporations)
- Social Security benefits received
- Unemployment income
- State income tax refund (if you received a refund from the state for last year)
- Alimony received or paid
- Moving expenses
- Any IRA contribution amounts and dates
- Any student loan payment documentation
- Any debt cancellation information
- Teachers – any classroom expenses
- Child care costs and child care provider information
- Medical expenses ONLY if the total amount paid exceeds 7.5% of your total gross income
- Mortgage interest and points paid for the year
- Real Estate taxes paid
- Personal property taxes paid for vehicles, trailers, motorcycles, boats, etc.
- Sales taxes paid on any big items, ie., vehicles, boats, etc.
- Employee expenses (NOT reimbursed by employer)
- Investment expenses
- Charitable contributions (cash and non-cash)
- Casualty and/or Theft losses
- Energy efficient home improvements – date of improvement, type of improvement and cost
- Household employee(s) information
- Profit and Loss statement of your business or farm
- Profit and Loss statement of your rental property
- Tax payments made
- Direct deposit information for your refund to be sent to you electronically
- Please list any life changes in this past year:
 - Additional dependents
 - Decrease in dependents
 - Retirement
 - Investment income
 - Lottery or gambling winnings
 - New business ventures
- Please list any questions or concerns you may have about your income taxes.

JFS is dedicated to helping you succeed financially!

*Our many fiscal services include *Income tax return preparation * Tax planning * Financial Consulting * Personal accounting*