Gundersdorff & Company - Accountants / 919-490-9014

Individual Tax Return Preparation Checklist / self-employed Sch C please ask for separate checklist

Client Name: ______________________________

Spouse Name: ______________________________

Tax Year: ____________

Prior 3 Tax Returns Filed: Please include copies only of the tax returns listed below, both Federal and State

☐ ________ ☐ ________ ☐ ________

Estimated Taxes Paid:

	Federal		**State**	
	Date Paid	Amount Paid	Date Paid	Amount Paid
☐ 1st Qtr - due 04/15				
☐ 2nd Qtr - due 06/15				
☐ 3rd Qtr - due 09/15				
☐ 4th Qtr - due 01/15				

Please include copies of checks or bank statements showing payments made

Please check all that apply, include all documentation, IRS documents must be originals, not copies

Income:

- ☐ W-2 Wages
- ☐ SSA-1099 Social Security Income
- ☐ 1099-R Retirement/Pension/Annuity/IRA Income/Roth Conversions
- ☐ 1099-INT Interest Income
- ☐ 1099-DIV Dividend Income
- ☐ 1099-B Sales of Stock
- ☐ 1099-MISC Miscellaneous Income
- ☐ Schedule K-1 Partnership or Sole Proprietor Income
- ☐ Other Income / 1099-G Unemployment / Alimony

Deductions:

- ☐ 1098 Mortgage Interest
- ☐ Property Taxes - Real Estate, Vehicle, & Pet
- ☐ Medical & Dental Expenses - Doctors, Prescriptions, Insurance, Eyeglasses, Miles Driven
- ☐ Charitable Contributions (must have receipt from organization or check) & Miles Driven
- ☐ Unreimbursed Employee Expenses (dues, subscriptions, uniforms, etc.) & Tax Prep Fees

Rental Property:

- ☐ Rental Property Income (include any 1099-MISC forms received)
- ☐ Expense Receipts / 1098 Mortgage Interest / Property Taxes / Homeowners Insurance
- ☐ Mileage Records / Total Miles Driven & Business Miles Driven / Auto Expenses

must have invoice or receipt for purchase of a depreciable asset

Additional Information:

- ☐ 5498 IRA / Roth IRA Contributions
- ☐ Sale of Real Estate (will need HUD Closing Statement from purchase and sale)
- ☐ Health Savings Account / 1099-SA for Distribution / 5498-SA for Contribution
- ☐ Child Care Expenses (must have EIN# or SS# of provider and address)
- ☐ College Tuition / 1099-T / 1099-Q
- ☐ Student Loan Interest Paid
- ☐ Educator Expenses