

A&B Accounting and Tax Services LLC

Please submit the following items for your individual tax return preparation.

Income Items

- | | |
|--|---|
| <input type="checkbox"/> Salary/Wages – W-2 | <input type="checkbox"/> Mutual Fund distributions – 1099 |
| <input type="checkbox"/> Social Security/Railroad Retirement | <input type="checkbox"/> Alimony received/paid |
| <input type="checkbox"/> Pension / Retirement income | <input type="checkbox"/> Unemployment income |
| <input type="checkbox"/> Interest – 1099-INT | <input type="checkbox"/> Lottery/Gambling winnings and losses |
| <input type="checkbox"/> Dividends – 1099-DIV | <input type="checkbox"/> Stock/Bonds sales (enclose 1099-B and cost info) |
| <input type="checkbox"/> IRA distributions | <input type="checkbox"/> Other income (enclose details) |

Personal Items

- IRA contributions
- SIMPLE/SEP KEOGH contributions
- Medical expenses, include all Forms 1095-A for the advanced payment of the Premium Tax Credit
- Form 1095-C, Employer Provided Health Insurance Offer and Coverage, if applicable
- Job related moving expenses
- Child care expenses (include provider's name, address and SSN/EIN)
- Mortgage interest
- Real estate taxes
- Charitable contributions
- Educator and Education expenses
- Professional Association or Union dues
- Job hunting expenses
- Tax return preparation fee
- Safe Deposit Box rent
- Federal/State/Local estimated tax payments
- Unreimbursed employee business expenses
- Use tax amount and any receipts or purchase records
- Copies of closing statements regarding the sale or purchase of real property
- Legal papers for adoption, divorce, or separation involving custody of your dependent children
- Any tax notices sent to you by the IRS or other taxing authority
- A copy of your income tax return from last year, if not prepared by this office
- Other miscellaneous deductions
- Email address where you can receive emails
- Bank Account information for direct deposit

Business Items

- Self-employed business income and expenses
- Independent Contractor - 1099
- Rental property income and expenses
- Partnership/S-Corp – K-1
- Estate/Trust – K-1
- Farm income
- Sale of any business assets?