

Tax Accountant's Interview Checklist Tax Year 2014

- Supporting Documents:
 - W-2s
 - SSA-1099/RRB-1099
 - K-1s
 - 1095-A
 - 1095-B
 - 1095-C
 - 1099-B
 - 1099-C
 - 1099-DIV
 - 1099-G
 - 1099-INT
 - 1099-K
 - 1099-MISC
 - 1099-R
 - Child Care Expenses (need providers name, address, & TID#)
 - 1098T
 - Moving Expenses
 - 1040-ES? _____
 - last year's tax return(s) – *(New clients only)*
 - Social Security Cards – *(New clients only and family additions)*

- Itemized Deductions
 - Medical _____
 - sales tax receipts _____
 - Property Tax – vehicles _____
 - 1098
 - Is it a refi? If yes, need settlement statement and purpose for cash out* _____
 - settlement statement
 - Charitable Contributions, need receipts: _____
 - Employee Business Expenses
 - Mileage _____
 - Union dues _____
 - Uniform and safety equipment expenses _____
 - Other _____
 - Tax prep – *(New clients only)* _____
 - Brokerage fees _____
 - Safety deposit box _____

- Self-employed
 - Mileage _____
 - Income _____
 - Expenses _____

- Rental Property
 - Mileage _____
 - Income _____
 - Expenses _____
 - # days rented _____
 - # days available for rent _____
 - # days under repair _____
 - # days personal use _____

- Items still needed: _____
- _____
- _____
- _____