

Glenn Consulting, LLC

2011 Tax Record Checklist

Basic Information

- Full names, SSN, birth dates of all family members and/or dependents*
- Address and telephone numbers for IRS or business contact*
- E-mail address for your tax correspondence with Glenn Consulting, LLC*
- 2010 income tax return copy, if you are a new client*

Income

- All W2's*
- 1099-MISC (contracting and self employment income)*
- Other employee compensation information*
- 1099-INT and 1099-DIV (interest and dividends from financial institutions)*
- Rents and royalties*
- 1099-B Sales of stock, mutual funds, residence and other property (all investment statements)*
- 1099-R (pension and annuity distributions) and SS-1099/RR-1099 (Social Security/Railroad retirement income)*
- Alimony (received or paid amount and payer/payee SSN)*
- Business and farm income (see also small business checklist)*
- State and local income tax refunds*
- Unemployment compensation and jury duty income*
- K-1 tax report from S-Corp, partnership or trust*
- Scholarships and fellowships*
- Other income, hobby, foreign income, prize money, insurance payment, etc.*
- Gambling and lottery winnings*

Deductions and Credits

- Medical, dental and vision expenses and mileage*
- Health and long term care insurance premium*
- State income tax and state sales tax paid*
- Real estate tax*
- Home mortgage interest and points*

- Personal property taxes (AZ Automobile registration, etc.)*
- Investment loan interest, expenses and mileage*
- Charitable contributions, cash and/or goods, total values with receipts*
- Personal expenses for charitable activities and mileage*
- Tax preparation fees and other professional fees*
- Job searching fees and job related expenses*
- Job related moving expenses and mileage*
- Professional organization dues and expenses*
- Retirement account information and maintenance expenses*
- Employee business expenses and depreciation expenses information*
- Casualty and theft losses*
- Post-high school level education - tuition and expenses*
- Business training and other business expenses*
- Child and dependent care expenses*
- Foreign taxes paid*
- Foreclosure, short sale, bankruptcy information if any*
- AZ school credit, property tax credit(140PTC),other AZ tax credit information*

Update for 2011 Tax Return (call us for information on tax law changes)

- Capital gains and losses information with new 1099-B forms*
- First-Time Homebuyer Credit for 2008(repayment)*
- Roth IRA conversion information and 2010 conversion information*
- Energy Efficiency/Renewable Energy tax credit*
- Health Coverage Tax Credit for health insurance premiums paid*
- Qualified Transportation Fringe Benefits*
- Foreign bank and investment account values and foreign assets*
- AZ Use Tax information on merchandise purchased out of state or Internet.*

Sumiko Glenn

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