



KAUNITZ & COMPANY

CERTIFIED PUBLIC ACCOUNTANTS

TAX INTERVIEW CHECKLIST

PERSONAL INFORMATION

- Name
- Date of Birth
- Social Security Card
- Last Year's Tax Return
- Valid Driver's License

DEDUCTIONS/ADJUSTMENTS

- Medical Expenses
- Real Estate Taxes
- Mortgage Interest
- Charitable Contributions
- Employee Business Expenses
- Gambling Losses
- Moving Expenses
- Traditional IRA Contributions
- Higher Education Expenses
- Educator Expenses
- Student Loan Interest

INCOME AND TAX INFORMATION

- W-2's
- Interest (1099-INT or substitute)
- Dividend Slips (1099-DIV or substitute)
- Stock Sales (1099-B or Broker Statement)
- Self-Employment Income and Expenses
- Sale of a Personal Residence
- Rental Income and Expenses
- Sale of any Business Assets
- Gambling or Lottery Winnings (W-2G)
- State Income Tax Refund (1099-G)
- Pension Income (1099-R)
- Estimated Taxes Paid
- Social Security (SSA-1099)
- Railroad Retirement (RRB-1099)
- IRA or 401(k) Distribution (1099-R)
- Unemployment Compensation (1099-G)
- Miscellaneous Income (1099-MISC)

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GOING BEYOND THE NUMBERS