

Tax Appointment Worksheet -- 2011

✓ Event	Documents or Information Needed
Married, divorced, or separated in 2011	Married – prior year return of both spouses Divorced – copy of the divorce decree Separated – copy of the separate maintenance agreement
Birth or adoption	Social Security cards and adoption papers
Death of child or spouse	Date of Death - Death certificate.
Additional members of household	Date of occupancy and relationship –
Job change	Start date – Name of new employer – W-2s from new and old employers
Retirement contribution	Type of plan – Amount of contribution –
Retirement distributions	Form 1099-R
Social Security benefits	Form 1099-SSA
Sale of stocks, bonds, etc.	Form 1099-B or other sale documents; basis or original costs
Purchase of stocks, bonds, etc., personal residence, or other real estate	Purchase documents; closing papers
Inheritance	Will; K-1 from the estate
Trade any property	Date of trade, property given up and property received, basis and FMV; qualified intermediary sales agreements or closing papers
Start or end a small business	Formation or termination dates; Property contributions or distributions
Lawsuit settlements	Date received; reason for the settlement; 1099-MISC
Rental property	Income; expenses; new property purchased
Prizes	Form 1099-MISC; value of prizes not included on Form 1099-MISC
Lottery or gambling	Total amount won whether on W-2G or not; total

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winnings	amount of losses
Health insurance, medical, dental, or drug expenses	Health insurance premiums; post-taxed payments; totals of other medical, dental, and drug expenses. If the health insurance is pretaxed (i.e. cafeteria plan, Sec. 125, POP), premiums have already been deducted from the wage.
Medical miles (19 cents per mile)	Total miles driven–
State taxes income, property taxes paid, sales tax paid on vehicles, motorcycles, or homes	Prior year’s income tax return; property tax bills; closing papers from the purchase or sale of property; letter from the state regarding any change in a prior filed return
Purchase or refinance a home	Closing papers from purchase; Forms 1098
Charitable contributions of money, property, or out-of-pocket expenses	Date and type of contributions, knowledge that receipts from the organizations have been received; mileage log for charitable work
Charitable miles (14 cents per mile)	Total miles driven –
Transfer of IRA to charity	Brokerage statement showing transfer
Job-related expenses	Meals, lodging, and miscellaneous expense amounts for items related to employment
Business miles (51 cents per mile, 55.5 after June)	Total miles driven, business miles driven per vehicle –
Educational or student loan interest expenses	Form 1098-T for parents or children; interest record for student loans; if the child is a student, the form will come to the child.
Child or disabled spouse care	The name, address, and ID number of the day care provider; the amount paid to the provider; if the provider comes into your home, a W-2 may be required.
Energy credit	Information regarding the purchase of qualifying vehicle, windows, doors, furnace, solar, or other energy upgrades.
Bankruptcy filing	Date filed –
Debt forgiveness or abandonment of property	Form 1099-A for abandonment Form 1099-C for cancellation