MEYER ACCOUNTING
Individual Tax Checklist

To help save you time and money, review the following list as you prepare for your tax interview. Bring the applicable items from this list to help us prepare a tax return that results in the largest allowable refund for you.

Personal Information		
	Name / Spouses Name	
	Address	
	SSN	
	Date of Birth	
Dependent Information		
	Names	
	SSN	
	Date of Birth	
Last Years Tax Return		
Wage Statements (W-2)		
Interest and Dividend Income (1099 Int/Div)		
Pension or Retirement Income (1099-R)		
State Income Tax Refund (1099-G)		
Social Security Income (SSA-1099)		
Unemployment Income (1099-G)		
Sales of Stocks or Bonds (1099-B)		
	Cost Basis and Purchase Date	
	Sale Price and Sale Date	
Self-Employee Income (1099-MISC)		
Income from Rental Property		
Partnerships, S Corps, Trusts - Schedule K-1		
IRA Contributions (Roth or Regular)		
Child Care Expenses & Provider Information		
Mortgage or Home Equity Int Paid - Form 1098		
Real Estate Tax Paid		
Personal Property Tax Paid		
Other Taxes Paid (Local)		
Cash Charitable Donations		
Noncash Charitable Donations		
Medical Expenses		
Job-Related Expenses		
Record of Purchase and/or Sale of Real Estate		
Educator Expenses		
Tuition and Education Expenses (1098-T)		
Student Loan Interest (1098-E)		

If you have any questions or to schedule an appointment, Please contact Sheryl Meyer at 816-804-0461 or via email Taxhelp4less@kc.rr.com