

# A.M. Accounting Services, LLC

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## 2011 Personal Tax Checklist

CLIENT \_\_\_\_\_ ID# \_\_\_\_\_ TAX YEAR \_\_\_\_\_

The purpose of this worksheet is to help you organize your tax information, in order to prepare your taxes.  
 A.M. Accounting Services, LLC will still need to see all supporting documentation.



### Personal Information

<b>Taxpayer's name</b>	
Soc. Sec. No	
Birthday	
Occupations	

<b>Spouse's name</b>	
Soc. Sec. No	
Birthday	
Occupations	

Address	
City	
State	
Zip	

Home Phone	
Mobile Phone - Taxpayer	
Mobile Phone - Spouse	
Other	
E-mail	

### Dependents

<b>Name</b>	
Soc.Sec.No	
Birth date	
Relationship	
Months in your home	

<b>Name</b>	
Soc.Sec.No	
Birth date	
Relationship	
Months in your home	

<b>Name</b>	
Soc.Sec.No	
Birth date	
Relationship	
Months in your home	

<b>Name</b>	
Soc.Sec.No	
Birth date	
Relationship	
Months in your home	

### Child Care Information (Per Child and Provider)

<b>Provider's Information</b>	
Name	
Address	
SSN/EIN	
Amount Paid	

### THINGS TO BRING - (This is just a sample)

- NEW CLIENTS** bring Last Years Tax Return
- W-2 (Wages, Salaries, and Tips)
- Interest Income (1099-INT)
- Dividends (1099-DIV)
- State or Local tax refunds (1099-G)
- 1099-Misc Income (Sole-Proprietorships – **Business Checklist**)
- Business Owner's K-1's and Outside Basis Worksheet
- Capital Gains or Losses -- For Stocks see (**Stock Records Worksheet**)
- Investment Income (1099-OID, 1099-R, 1099-B, IRA, 401K, Roth, Pensions, and etc.)
- Sale of a Home / Asset (1099-S) -- See Checklist (**Sale of a Personal Resident**)
- 1099C and/or 1099A Foreclosure & Short Sale
- Rental Properties (Breakdown) -- See Checklist (**Rentals and Other Income**)
- Social Security Benefits (SSA-1099, RRB-1099)
- Other Income (Gambling Winnings and etc.) -- See Checklist (**Rentals and Other Income**)
- Deductions-Schedule A -- See Checklist (**Schedule A - Itemized Deductions**)
- Real Estate Property Tax