Checklist for Individual Tax Information

In order to prepare your 2010 individual income tax return, we will need the following financial information. **Please send photocopies.** **Do not send originals**.

- ❑ Form(s) W-2 (wages, etc.)
- ❑ Form(s) 1099 (interest, dividends, etc.)
- ❑ Schedule(s) K-1 (income/loss from all partnerships, S corporations, etc.)
- ❑ Form(s) 1098 (mortgage interest) and property tax statements.
- ❑ Brokerage statements from stock, bond or other investment transactions, including purchase date and price of all securities sold.
- ❑ Closing statements pertaining to real estate or business transactions.
- ❑ Financial statements for any rental properties, farm operations, or sole proprietor businesses.
- ❑ Contributions to retirement plans including 401(k), traditional IRA, Roth IRA, etc.
- ❑ Contributions to Health Savings Account or College Savings Plans.
- ❑ If we did not prepare your 2009 income tax return, please provide a copy of the last two years returns along with birth dates for yourself, spouse, and all dependents.
- ❑ Any new dependents in 2010 along with birthdates and social security numbers.
- ❑ Any change of address during the 2010.
- ❑ Any Federal and/or State estimated tax payments made for 2010 including dates and amounts.
- ❑ Signed Engagement Letter, we cannot begin the processing of your information unless we have a signed copy returned to us.
- ❑ Retainer arrangements have been made with the office. We cannot begin the processing of your information without it.

If it would be convenient for you, we can provide a 2010 Tax Organizer that will assist you in collecting and reporting information necessary for us to properly prepare your 2010 individual income tax return. To request an organizer, call Lacy Carter at our office (435) 865-5866 or send an email to lacy@kohlereyrecpas.com.