

**\*\*\*INFORMATION NEEDED FOR 1040 TAX CLIENTS\*\*\***

Last 2 years Tax Returns (New clients)  
Copy of all Social Security Cards (New Clients)  
Income – W-2's & 1099's  
K-1's from investments in business  
Interest/Dividend Income  
Sale of Stocks

**DEDUCTIONS:**

List of Dependents with relationship, Social Security # and Date of Birth for each  
Child Care - Name of Facility  
Federal ID#,  
Amount Paid  
Address  
Total charitable contributions (cash & non-cash); need to have Documentation  
Real Estate Property Taxes  
Personal Property Taxes (cars, boats, equipment) for those outside of Texas  
Medical Expenses  
Mortgage Interest

**PURCHASE OR SALE OF HOUSE:**

Closing documents  
Date of Sale  
Cost of home  
1099-S

**BUSINESS:**

Total Income  
Expenses by Category

**HOME OFFICE:**

Total Square Footage of home  
Square Footage Used for office  
Total spent on utilities (electric and gas)  
Total spent on Homeowners' & Flood Insurance, and real estate taxes  
Total spent on Mortgage, Interest  
Total Repairs to home

**CAR USED IN BUSINESS**

Total Mileage  
Business Miles  
Personal Miles

**RENTAL PROPERTY:**

Rental Income for each property  
Expenses for each property  
Cost of home when purchased  
FMV when home was rented out