While every individual return is different the following are the most common items necessary for your appointment:

☐ **Employees:**
- ☐ All forms W2--should have one from each employer you worked for during 2011
- ☐ Expenses that your employer did not reimburse if they are significant

☐ **Homeowners or Itemizers:**
- ☐ Medical and dental expenses paid and not reimbursed by insurance or flex plans
- ☐ Mortgage statement showing interest and taxes paid (Form 1098)
- ☐ Home closing statements if you purchased and/or sold a home during 2011
- ☐ Energy efficient home improvements purchased and installed in 2011
- ☐ Auto registrations paid during the year
- ☐ List of cash contributions to charities including religious institutions
- ☐ List of non-cash contributions (Goodwill, Salvation Army, etc.)

☐ **Parents:**
- ☐ Social security card for any children born in 2011
- ☐ Child care expenses
- ☐ Name, Address and Tax ID of your child care providers if they are new this year
- ☐ College tuition expenses for your dependents

☐ **Savers and Investors:**
- ☐ Interest (1099INT) and Dividend (1099DIV) statements from banks and brokerages
- ☐ All K1s for partnerships owned
- ☐ List of any sales of bonds or stocks during the year (1099B)
- ☐ Amount paid for any stocks or bonds that were sold during the year

☐ **Business Owners**
- ☐ Total gross income for 2011 (bring any 1099s received)
- ☐ List of business expenses summarized by category

Please note if your business has numerous transactions please request the separate business spreadsheet if you do not have your own accounting system.

☐ **New Personal Tax Clients:**
- ☐ Previous year tax return
- ☐ A voided check if you want your refund directly deposited into your bank account

☐ **Other miscellaneous items:**
- ☐ All retirement funds taken or distributed usually included on 1099R forms
- ☐ Student loan interest paid
- ☐ Unemployment compensation received
- ☐ Teachers of grades K-12 should have all receipts for classroom supplies.

Please keep in mind these are just common items. If you have something not covered by this list or have any questions about your specific situation please contact me at (480) 991-2820 or andrew@ajmarkcpa.com.