

Henninger Accounting Services, P.C.

Submitting the items outlined in the checklist below will save our staff time in preparing your tax returns.

Income Items

- _____ Salary/Wages – W-2
- _____ Social Security/Railroad Retirement
- _____ Pension / Retirement Income
- _____ Interest – 1099-INT
- _____ Dividends – 1099-DIV
- _____ IRA Distributions
- _____ Mutual Fund Distributions – 1099
- _____ Alimony Received/Paid
- _____ Unemployment Income
- _____ Lottery/Gambling Winnings and Losses
- _____ Other Income (Enclose Details)
- _____ Stock/Bonds Sales (Enclose 1099-B and Cost info.)

Personal Items

- _____ IRA Contributions
- _____ SIMPLE/SEP KEOGH Contributions
- _____ Medical Expenses
- _____ Job Related Moving Expenses
- _____ Child Care Expenses
(Include Provider's Name, Address and SSN/EIN)
- _____ Mortgage Interest
- _____ Real Estate Taxes
- _____ Charitable Contributions
- _____ Educator and Education Expenses
- _____ Professional Association or Union Dues
- _____ Job Hunting Expenses
- _____ Tax Return Preparation
- _____ Safe Deposit Box Rent
- _____ Federal/State/Local Estimated Tax Payments
- _____ Unreimbursed Employee Business Expenses
- _____ Other Miscellaneous Deductions
- _____ Email address where you can receive emails

Business Items

- _____ Self-Employed Business Income and Expenses
- _____ Independent Contractor - 1099
- _____ Rental Property Income and Expenses
- _____ Partnership/S-Corp – K-1
- _____ Estate/Trust – K-1
- _____ Farm Income
- _____ Did You Sell Any Business Assets?