

Henninger Accounting Services, P.C.

Please submit the following items for your individual tax return preparation.

Income Items

- | | |
|-------------------------------------------|--------------------------------------------------------|
| _____ Salary/Wages – W-2 | _____ Mutual Fund distributions – 1099 |
| _____ Social Security/Railroad Retirement | _____ Alimony received/paid |
| _____ Pension / Retirement income | _____ Unemployment income |
| _____ Interest – 1099-INT | _____ Lottery/Gambling winnings and losses |
| _____ Dividends – 1099-DIV | _____ Stock/Bonds sales (enclose 1099-B and cost info) |
| _____ IRA distributions | _____ Other income (enclose details) |

Personal Items

- _____ IRA contributions
- _____ SIMPLE/SEP KEOGH contributions
- _____ Medical expenses, include all Forms 1095-A for the advanced payment of the Premium Tax Credit
- _____ Form 1095-C, Employer Provided Health Insurance Offer and Coverage, if applicable
- _____ 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 fee
- _____ Safe Deposit Box rent
- _____ Federal/State/Local estimated tax payments
- _____ Unreimbursed employee business expenses
- _____ Use tax amount and any receipts or purchase records
- _____ Copies of closing statements regarding the sale or purchase of real property
- _____ Legal papers for adoption, divorce, or separation involving custody of your dependent children
- _____ Any tax notices sent to you by the IRS or other taxing authority
- _____ A copy of your income tax return from last year, if not prepared by this office
- _____ Other miscellaneous deductions
- _____ Email address where you can receive emails
- _____ Bank Account information for direct deposit

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
- _____ Sale of any business assets?