

Tax Information Checklist

This checklist is intended to help you gather your information by reminding you of possible income or deductions you may not have thought of. If you don't find it helpful, you do not need to use it.

You may have income from one or more of the following. Please enclose all copies of the forms you received.

From your employer or the government:

- W-2 (Wages)
- 1099-SSA for Social Security Benefits
- 1099-G for Unemployment Benefits
- 1099-G for a Tax Refund
- 1099-R (Distribution from Pension)

From a partnership, LLC, S-corporation, Estate or trust

- Form K-1

Because K-1s often do not arrive until after April 1st, please do not wait until you have received your K-1s to give us your information.

From your bank, stockbroker, or mutual funds:

- 1099-Int (Interest Income)
- 1099-OID (Original Issue Discount)
- 1099-Div (Dividend Income)
- 1099-B (Proceeds from Broker)
- 1099-C (Cancellation of Debt)

Please provide us with all of the year-end information sent by your broker or mutual fund.

From someone who made certain payments to you:

- 1099-Misc (Miscellaneous Income)
- W-2G (Gambling Income)
- 1099-PATR (Patronage Dividends)
-

Have you received or should you have received any W-2s or 1099s that you have not provided to us?

Y N

Are you aware of any errors in any of the attached W-2s or 1099s?

Y N

If you have income not listed above, please enclose all information related to it.

Did you and your family have health insurance all year?

Y N

Y N

(OK residents) Did you purchase any goods from out of state sellers, for use in Oklahoma, on which you did not pay sales tax? How much did you spend?

Y N

Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?(Foreign Stocks held in a US brokerage account do not count. If you have signature authority over an account, including that of an employer or relative, you should answer Yes

Y N

Did you have stock, or any other ownership interest in any foreign corporation, partnership, trust, estate, fund or other entity that is not held in a US brokerage account), or any financial instrument or contract issued by a foreign person or business?

Did you receive any correspondence from the IRS or Oklahoma Tax Commission for prior years? Is so, please attach a copy of the letter(s) if we do not already have them.

You may be able to claim a **deduction** for one or more of the following. Please summarize your expenses in each area, or provide receipts, cancelled checks, or other documentation.

_____ Medical expenses. Do not include expenses paid or reimbursed by insurance. (Medical expenses are only deductible if they are more than 7.5% of adjusted gross income)

_____ Cash charitable contributions. For contributions over \$250, **you must have written confirmation of your contribution.**

_____ Non-cash charitable contributions. Please provide a list of which charities you contributed to, the date of the contribution, what you contributed, and the value of each contribution. This information is usually provided on your receipt from the charity. For contributions over \$250, **you must have written confirmation of your contribution.**

_____ Property taxes. These may be included on your mortgage interest statement.

- _____ Sales taxes paid on large ticket items like automobiles or items used in new construction.
- _____ Classroom supplies (teachers only)
- _____ Employee business expenses, such as uniforms, dues, tools, and mileage. Please list each expense on a separate sheet. (Employee business expenses are only deductible to the extent they exceed 2% of your adjusted gross income.)
- _____ Mortgage interest. Enclose your Form 1098.
- _____ Student loan interest. Enclose your Form 1098-E.

If you have deductions not listed above, please enclose all information related to them.