2011 INFORMATION CHECKLIST

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Chesterfield, VA 23832

Client____

Please complete the questionnaire on the reverse side and sign the engagement letter.
The return will not be started without the signed engagement letter.

___ All W-2's.

___All 1099 forms received confirming income from interest, dividends, retirement, social security, disability, unemployment, gambling winnings, etc.

___All income information for children if you want us to prepare any required returns.

___Year-end statement of mortgage interest (Form 1098), escrow activity and balance on mortgage or home equity loans. **Target area for the IRS**

___ List of Cash charitable contributions by name and details(donation date, FMV) for any non-cash contributions over $500. **Target area for the IRS**.

___ Copies of all LLC, Partnership, or S-Corporation K-1's (send separately later if everything else is ready, and let us know about it)

___ If you bought, sold, or refinanced real estate, then a closing statement for each transaction.

___ If you sold any shares of mutual funds, stocks and bonds and original cost information is not provided by the broker, detail all activity in the funds sold from original purchase date through date of sale (year end summary statements are ideal).**Digital Documents Preferred**

___Sole proprietors – all business income and expenses - Quickbooks backup(not accountant's copy) or **Digital** copy of Excel Spreadsheets a Plus

___Rental property – all income and expenses per property

___ If you are claiming auto mileage as a deduction for business, rental properties, or unreimbursed employee expenses, we need to know: Total miles,________ commuting miles __________ , and business miles____________ driven for the year. Please provide actual expenses if standard mileage not used ie Lease payments, interest, gas, car washes, licenses, insurance, tires, repairs, etc.

___ Leasing agreements or purchase papers for new vehicles or other assets.

___ Copies of any federal, state, or local tax correspondence during the year, including all payments made or refunds received.

___ All legal documents for formation, sale or purchase of a business during the year.

___ All legal documents for a divorce decree.

___ Voided check for account where refunds should be direct deposited. (Optional)

___ **New Clients**: Copies of prior federal, state, local returns and depreciation schedules if applicable (at least one year, preferably three).

If you would like a detailed organizer, please call our office (804) 748-9135 or email Ruth at rdunkerly@sandraclaytorcpa.com and we will mail or email one to you.

Complete the information on other side
Your information can be scanned and emailed for tax preparation, call if you have any questions.

Be sure and visit our website www.sandraclaytorcpa.com