

FROST TAX SERVICE

The following is a list of some of the most common items needed to completely prepare your tax return.

Please bring these items to your appointment.

- **W2's from all of your employers**
- **All forms 1099:**
 - miscellaneous income, interest income, dividend income, pension/annuities income, unemployment received, Social Security income, and rents/royalties.
- **Charitable Contributions**
 - List of all contributions including name and amount paid (make sure you have receipts for all items listed)
 - List of charitable mileage and calculation
- **List of all stocks or bonds purchased or sold (Form 1099)**
- **K-1's from Partnerships or S-Corporations**
- **IRA or Roth IRA Contributions**
- **Estimated payments made to the IRS, PA and Local Municipalities**
- **Child Care Payments:**
 - You need to provide Name, Address and SS# or EIN# of caregiver
- **Child in College Tuition Statement:**
 - Form 1098-T – also include the amount of tuition actually paid in 2011.
 - Form 1098-T shows what was billed.
 - Student Loan Interest Statement
 - Form 1098-E Payments from Qualified Education Programs
 - Form 1099-Q
 - Other expenses paid – some may be deductible
- **Self Employed Individuals:**
 - Schedule C Filers Income
 - Documentation of In-Home Office Expenses
 - Insurance-Business/Health Real Estate taxes
 - Mortgage interest Repairs/maintenance
 - Rent
 - Utilities – electric, gas, water/sewer, trash removal
 - Vehicle used and total business miles
 - Vehicle traded in or new purchases
 - Retirement Contributions
 - Estimated payments made to the IRS, Pennsylvania and Local Municipalities.
- **Schedule F filers (Farm):**

- Farm Income Income from sale of animals or crops
 - Any subsidized payments
 - Expenses incurred in the operation of the farm
- **Rental Properties:**
 - Income
 - Expenses List of Capital Improvements
- **Sale of Personal Residence:**
 - Copy of settlement sheet on purchases of residence or Form 2119 in year of sale of old residence
 - Copy of settlement sheet on new purchase of residence
 - List of all capital improvements to house sold
 - Points paid on purchase of new residence
- **Medical Expenses:**
 - Doctor, Dentist
 - Prescription medicines
 - Medical Insurance, etc.
- **Professional Expenses:**
 - Work related expenses (such as uniforms, tools, boots, etc. that employer did not provide that you need to do your job)
 - Union Dues
- **Tax preparation Fees, etc.**