

HAMPTON TAX AND FINANCIAL SERVICES, LLC

Tax Return Preparation Checklist

Personal Information

- Name, Birthday and Social Security for all family members
- Your occupation and your spouse's occupation.
- Copy of valid ID and SSN# (driver's license or passport and SS card)
- Home address, phone number, and email address
- Are you or your spouse a full time or part time student?
- Copy of most recently filed tax return, if not prepared in our office
- For the child care credit: Provider's address, Tax I.D. number and amount paid to provider for each child (This is critical to qualify for child care credits)
- Full time or part-time resident as of 12/31
- Do you or your spouse want to contribute \$3 to the Presidential Election Campaign Fund?
- Record of federal and state estimated tax payments made for the current tax year
- Amount paid with extension

Income Information

- Annual wage statements: Form W-2, 1099
- Interest and Dividend Statements 1099-Int/1099-Div
- Social Security Benefits Statement
- IRA, Pension/Retirement distribution statements 1099-R
- Brokerage Year-End Tax Statements (sale of stocks, bonds & mutual funds)
- Sale of real estate property (investment & primary residence)
- State refund form 1099-G
- Rental income and expenses
- Other income (including Gambling, alimony, jury duty and other miscellaneous income)
- Unemployment compensation
- Partnership, estate or S-Corporation schedules K-1
- Business income
- Capital loss carryover

Deductions

- Mortgage and home equity interest statements
- Mortgage insurance premiums
- Real estate taxes paid
- Sales tax paid on new vehicle
- Ad-Valorem taxes paid on vehicles and boats
- Savings withdrawal penalty
- Prescription drugs
- Doctor and hospital bills
- Other medical bills – physical exams, eyeglasses, contact lenses, copayments, medical insurance, mileage to medical appointments and parking fees.
- Charitable donations-cash, household goods and out-of-pocket expenses

Mailing Address: PO Box 2754, Stockbridge, Georgia 30281

Phone: 404-482-3170 / **Fax:** 877-323-3932 / **Email:** info@HamptonFinancialLLC.com

Website: www.HamptonFinancialLLC.com

- Investment interest (Margin Interest)
- Moving expenses. If your move was more than 50 miles.
- Teacher out-of-pocket expenses
- Student loan interest
- Job-hunting expenses
- Adoption expenses
- Alimony paid & social security number of recipient to whom alimony was paid
- Educational expenses: tuition, fees and continuing education
- Tax preparation fees
- Safe deposit box fees
- Union dues
- Investing publications and expenses
- Employee non-reimbursed expenses
- Uniforms
- Business vehicle description and business miles driven
- Self-employment income and expenses

Direct deposit information

Banking Institution Name: _____

Routing number: (numbers on the lower left side of check - usually first nine digits)

Bank account number (number from bottom of the check or on bank statement)

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