

PASCUAL & ASSOCIATES TAX SERVICE PREPARATION CHECKLIST

Please bring SSN or TIN for taxpayers and all dependants being claimed

INCOME: W-2, 1099, ETC...	NEW DEPRECIABLE PROPERTY	CHILD CARE EXPENSE	MISC JOB EXPENSES
INTEREST - BRING 1099 INT	HOUSE OR BUILDING COST	PAID TO:	UNION TRADE DUES
DIVIDENDS - BRING 1099-B	AUTO OR TRUCKS	ID OR SS#	TOOLS & JOB SUPPLIES
STATE TAX REFUND	TOOLS OR EQUIPMENT	ADDRESS	UNIFORMS REQUIRED:
PENSIONS - BRING 1099-R	OTHERS	MEDICAL EXPENSE	SHIRTS, PANTS, DRESSES
ALIMONY RECEIVED		PRESCRIPTION DRUGS	SHOES, HOSE & SMOCKS
UNEMPLOYMENT COMP.	AUTO EXPENSE - ACTUAL	HEALTH ACCIDENT INSURANCE	LAUNDRY & CLEANING
SOCIAL SECURITY - 1099-R	TOTAL AUTO MILES	MEDICAL MILEAGE	ACCESSORIES
PRIZES AND AWARDS	TOTAL BUSINESS MILES	GLASSES & CONTACTS	SAFETY EQUIPMENT
JURY DUTY	GAS AND OIL	HEARING AID & BATTERIES	JOB SEEKING EXPENSE
GAMBLING - W-2G	REPAIRS & SERVICE	DOCTOR / DENTIST / HOSPITAL	MILEAGE
	TOTAL INSURANCE	TAXES & LICENSE	RESUME
BUSINESS OR RENTAL INCOME	LEASE COST	PROPERTY REAL ESTATE	AGENCY FEE
GROSS RECEIVED	REGISTRATION	PERSONAL PROPERTY	OTHER TRAVEL EXPENSES
PURCHASE OR REPLACEMENT	PARKING & TOOL	STATE INCOME	JOB TRAVEL OR EDUC EXPENSE
MATERIALS & SUPPLIES	AUTO INTEREST	REGISTRATION	MILEAGE
LABOR	OTHERS	INTEREST EXPENSE	OTHER TRANSPORTATION
ENDING INVENTORY		MORTGAGE - BRING 1098	TUITION
ADVERTISING	PURCHASE/REFINANCE OF PROPERTY	MORTGAGE PERSONAL PAID	OVERNIGHT MEALS
BANK CHARGES	DATE OF PURCHASE/REFINANCE	NAME	BOOKS & SUPPLIES
DUES & PUBLICATIONS	ESCROW STATEMENTS	ADDRESS	PARKING
FREIGHT DELIVERY	SALE OF PROPERTY	SS# OR ID	OTHERS
INSURANCE	1099-S & CLOSING STATEMENTS	INVESTMENT INTEREST	NON-REIMBURSED MOVING COST
INTEREST MORTGAGE		CONTRIBUTIONS	TOTAL DISTANCE MOVED
OTHER INTEREST	ADJUSTMENT TO INCOME	NON-CASH LIST	MOVING VAN & STORAGE
UNIFORM & LAUNDRY	IRA OR KEOGH TAXPAYER	CHURCHES	LODGING
LEGAL & ACCOUNTING	IRA OR KEOGH SPOUSE	PAYROLL	MEAL
ENTERTAINMENT		OTHERS	
RENT - EQUIPMENT	ALIMONY PAID AMOUNT	MISC DEDUCTIONS	MISC DEDUCTIONS LIMITED
RENT - FACILITIES	NAME PAID TO:	GAMBLING LIST DETAILS	TAX PREPARATION COST
OFFICE SUPPLIES	SS#	ESTATE TAX	LEGAL & INVESTMENT
SALARIES & WAGES	ADDRESS		
TAXES & LICENSES	CITY & ST		
TELEPHONE & UTILITIES			
SCHEDULE K-1 (S Corp/Partnership/LLC)			
CELLULAR SERVICE			