

Tax Year 2007 Appointment Checklist

Taxpayer: _____ Spouse: _____

Social Sec.# _____ Social Sec. # _____

Last year: Address & Dependent information is on file with CSL Tax
Please inform your preparer of any changes.

Checklist for items to bring to your appointment:

<input type="checkbox"/> W-2's (All copies) – Wage Income	<input type="checkbox"/> 1098 Mortgage Interest Paid (include 2 nd Mortgages & Home Equity Loans, and Refinances.
<input type="checkbox"/> 1099(INT) – Interest Income from CD's, saving, and checking accounts.	<input type="checkbox"/> Real Estate Tax Paid (Usually reported on the 1098 statement)
<input type="checkbox"/> 1099(DIV) – Dividend Income from Mutual Funds and Stocks.	<input type="checkbox"/> Personal Property Tax Statement or Amount \$ _____
<input type="checkbox"/> 1099(R) – Pension, IRA, 401(k) Withdrawals	<input type="checkbox"/> Home Sale/Purchase/Refinance–(Bring the Settlement Statements)
<input type="checkbox"/> 1099(B) – Mutual Fund Sales, Stock Sales <input type="checkbox"/> Cost Basis for Investments Sold	<input type="checkbox"/> Check for Refund Direct Deposit Year end pay-stub. 2007 check register
<input type="checkbox"/> Rental Real Estate Property (call for special organizer form or download from web site)	<input type="checkbox"/> Medical Deductions – Must be over 7.5% Total income .
<input type="checkbox"/> Unemployment Benefits	<input type="checkbox"/> Charitable Contributions Totals – Cash, check, and Clothes etc.(use garage sale value)
<input type="checkbox"/> Social Security Benefits	<input type="checkbox"/> Residential Energy Credit Expenses (Insulation, Heating A/C, windows)
<input type="checkbox"/> State Tax Refund – Form 1099G	<input type="checkbox"/> Unreimbursed Employee Business Expenses
<input type="checkbox"/> Teacher classroom expenses	<input type="checkbox"/> Child Care Expenses – Name, address, ID Number required.
<input type="checkbox"/> Sales Tax Paid-Car, Boat, RV \$ _____	<input type="checkbox"/> College tuition expenses – May qualify for Tax Credit, or deduction. <input type="checkbox"/> Student Loan Interest Paid