Tom Cole Tax, The Tax Doctor, Inc.
Tax Preparation and Audits
18231 Bear Valley Road, Hesperia, CA 92345
(760) 948-3100

Client Checklist:

- [ ] Wage Statements / W2's
- [ ] Driver's License (for everyone included in the return)
- [ ] Social Security Cards (for everyone included in the return)
- [ ] Dependent Social Security Numbers & Date Of Birth
- [ ] Last Year Federal & State Tax Return (If you are a current client we have these)
- [ ] Child Care Expenses & Provider Information
- [ ] Lottery or Gambling Winnings/Losses
- [ ] State & Local Taxes Paid
- [ ] Mortgage or Home Equity Loan Interest Paid (1098)
- [ ] Real Estate & Personal Property Taxes
- [ ] Cash & Non-Cash Charitable Donations
- [ ] Medical & Dental Expenses
- [ ] Record of Purchase or Sale of Residence
- [ ] Alimony Paid or Received
- [ ] Unreimbursed Employment Related Expenses
- [ ] Job Related Educational Expenses
- [ ] Educator Expenses
- [ ] Tuition & Education Fees (1098-T)
- [ ] Student Loan Interest (1098-E)
- [ ] Casualty or Theft Losses
- [ ] Commissions Received/Paid
- [ ] Pension, Retirement Income (1098-E)
- [ ] Unemployment Income (1099-G)
- [ ] Cancelled Debt Amount (1099-C)
- [ ] Social Security Income (SSA-1099)
- [ ] IRA Contributions
- [ ] Statement of Sale of Stocks or Bonds (1099-B)
- [ ] Interest & Dividend Income (1099-INT/1099-DIV)
- [ ] State Refund Amount (1099-G)
- [ ] Income & Expenses from Rentals
- [ ] Self-Employed Business Income & Expenses (1099-MISC)
- [ ] Estimated Taxes or Foreign Taxes Paid
- [ ] HUD-1 Statement or Substitute (if new home was purchased)
- [ ] Advanced Child Tax Credit letter 6419
- [ ] 1099-K Merchant Charges
- [ ] Registered Domestic Partners-Both Members info separately
- [ ] Any notices, bills, etc. form FTB or IRS
- [ ] K-1 for S-Corp, Partnership, LLC, Trust
- [ ] Form 1095-A Health Insurance Statement
- [ ] 1099 Misc. Middle Class Tax Refund (CA Gas Tax Rebate)