

# TAX INNOVATIONS

---

12586 Birkdale Way • Fairfax • VA 22030 • 703-401-6894 (C) • 703-880-3228 (O) • Email: tax.innov@gmail.com

## ❖ Tax Preparer's Checklist

- ✓ **Your Name, Social Security, Date of Birth and Present/Permanent Address.**
- ✓ **Your Spouse's Name, Social Security, and Date of Birth.**
- ✓ **Your Dependent's Name, Social Security, and Date of Birth.**
- ✓ **Your Home and Cell phone number.**
- ✓ **Need To Know Your Current Job Title.**
- ✓ **Need All W2 and 1099 (Miscellaneous Income)**
- ✓ **Need any Bank Interest Income Or Dividend Income if any.**
- ✓ **Do You Have Your Own House? If yes then we need your Mortgage Interest Statement and Property Tax Information.**
- ✓ **Charitable Contributions if any.**
- ✓ **Need Your Bank Routing and Account Number.**
- ✓ **Did You Pay Any Education, Childcare Expenses?**
- ✓ **Did You Move during the year of 2006? If yes then we need Mileage Between the two Places and Expense Information.**
- ✓ **Any Job Related Expenses.**
- ✓ **Do not need any Receipt for Expenses, but summary.**
- ✓ **Need Passport to Apply For Taxpayer Identification Number.**
- ✓ **Any other Income (unemployment, Jury Duty etc.)**
- ✓ **Any Estimated Taxes paid to Federal/State during the year 2006.**