2010 Tax Checklist

Rosetta Tax Service

√	**Event**	**Documents or Information Needed**
	Over $10,000 in foreign bank account(s)	Bank and account information
	Married, divorced, or separated	Married: prior year's return Divorced: finalized date; copy of divorce decree Separated: copy of the separate maintenance agreement Community property income allocation
	Birth or Adoption	Social Security cards and adoption papers
	Death of child or spouse	Date of death
	Additional members of household	Date of occupancy and relationship
	Wages	All W-2s
	Interest	1099-INT
	Dividends	1099-DIV
	Job change	Start date Name of employer W-2s from new and old employers
	Sale of stocks, bonds, etc.	Form 1099-B or other sale documents Purchase date and cost
	Unemployment	Unemployment form
	Retirement contribution	Type of plan Amount of contribution
	Retirement Distributions	Form 1099-R
	Social Security benefits	Form 1099-SSA
	Inheritance	Will; K-1 from estate Decedent's basis of property if death occurred in 2010
	Start or end a small business	Formation and termination dates Property contributions or distributions
	Rental property	Income; expenses; new property purchased
	Prizes	Form 1099-MISC; value of prizes not included on Form 1099-MISC
	Lottery or gambling winnings	Total amount won whether on W-2G or not; Total amount of losses
	Health insurance, medical, dental, or drug expenses	Health insurance premiums; post-tax payments; totals of other medical, dental, and drug expenses. If the health insurance is pre-tax (ie. Cafeteria plan, Sec. 125, POP), premiums have already been deducted from the wage.

	Medical miles	Total miles driven
	Medicare recipients	One-time donut hole payment of $250
	State tax income: property taxes, sales on tax paid on vehicles, motorcycles, or homes	Prior year's income tax return; property tax bills; closing papers from the purchase or sale of property; letter from the state regarding any change in a prior filed return
	First Time Homebuyer Credit	Binding contracts by 4/30/2010 – closing 9/30/2010 HUD-1 or similar statement; new address on check stub, mortgage statement, insurance
	Charitable contributions of money, property, or out-of-pocket expenses	Date and type of contributions, knowledge that receipts from the organizations have been received
	Charitable miles	Total miles driven, mileage log for charitable work
	Transfer of IRA to charity	Custodian statement showing transfer and acknowledgement from charitable organization
	Job-related expenses	Meals, lodging, and miscellaneous expense amounts for items related to employment
	Business miles	Total miles driven, business miles driven per vehicle
	Educational or student loan interest expenses	Form 1098-T for parents or children; interest record for student loans; if the child is a student, the form will come to the child. Actual expense record to verify expenses for credit/deduction purpose
	Child or disabled spouse care	The name, address, and ID number of the day care provider; the amount paid to the provider; if the provider comes into your home, a W-2 may be required.
	Energy Credit	Information regarding the purchase of qualifying vehicle, windows, doors, furnace, solar, or other energy upgrades. Amount claimed in 2009
	Lawsuit settlements	Date received; reason for the settlement; 1099-MISC
	Bankruptcy filing	Date filed – Bankruptcy papers to show property rejected/returned by court
	Debt forgiveness or abandonment of property	Form 1099-A for abandonment Date property was taken by the bank or sold in foreclosure Form 1099-C for cancellation
	Economic stimulus payment	Amount
	IRS notifications	Letters from IRS