KRISHNAN COMPANY
CERTIFIED PUBLIC ACCOUNTANT

PERSONAL TAX CHECKLIST

MAIN INFORMATION

Please provide the NAME, ADDRESS, SS#, DATE OF BIRTH OF YOURSELF AND SPOUSE.
In addition please provide the NAME, SS#, DATE OF BIRTH AND RELATIONSHIP OF EACH DEPENDENT

INCOME (Please submit all that apply)

1. W2 for Taxpayer & Spouse
2. 1099 – Interest & Dividend Statement
3. 1099-R. If there has been a retirement distribution this form is needed plus the documentation to reflect any rollover
4. 1099-G – For unemployment compensation
5. W2-G – For lottery winnings
6. 1099-Misc – if worked as an independent contractor (Please also provide expense deductions if any)
7. Stock statements from brokerage firms for sale of stocks
8. Schedule K1s from Partnerships, LLCs and S corporations
9. If owning investment property on personal name, details of the property, rental income and rental expenses
10. Any other relevant income documents

DEDUCTIONS (Please submit all that apply)

1. Student Loan Interest
2. IRA contributions
3. Personal health insurance payments (If self-Employed)
4. Home Mortgage Interest Statement (Form 1098)
5. Home property tax payment (May be part of Form 1098)
6. If purchased a new home or refinanced, Pages 1 & 2 of the HUD settlement statement
7. Ad Valorem Taxes (On automobile, paid usually on one's birthday in GA)
8. Any charitable contributions – Please list the cash contributions separately from contributions in Kind (Such as clothes etc)
9. Any unreimbursed job related expenses (Such as mileage, travel etc)
10. Day Care expenses – Please provide the name, address, Federal ID# or Social Security number of the daycare provider and the amounts
11. Any other relevant deduction documents

OTHER ITEMS THAT ARE REQUIRED

1. **If client needs DIRECT DEPOSIT OF THE REFUND, we REQUIRE a copy of client's VOID CHECK.**
2. **If self-employed please provide in WRITING the 4 quarterly estimated tax payments made to the federal and the state.**
3. **If self-employed please also provide an estimate of income and expenses for the current year in order for us to calculate estimated taxes for the current year.**
4. **In addition, for paperless filing we will fax a PIN form and clients are required to choose a PIN number and fax the form back to us without which we cannot electronically file the return.**
5. **A copy of previous year's tax return if our firm did not process your prior year personal tax returns.**

CPA SM

America Counts on CPAs

746 HOLCOMB BRIDGE ROAD, NORCROSS, GA 30071
TEL. 770 . 368 . 1030 FAX. 770 . 368 . 1060 WWW.KRISHNANCO.COM