KRISHNAN COMPANY

CERTIFIED PUBLIC ACCOUNTANT

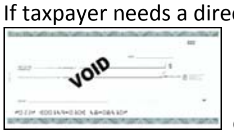
PERSONAL TAX CHECKLIST

The following is a checklist of information all taxpayers will need in order to file their personal income taxes. Taxpayers will need to compile this information for themselves, their dependents, and their spouse if filing a joint return.

1) Personal information (Taxpayer, each dependent and spouse)
   a) Full Name
   b) Address
   c) Social Security Number (Taxpayer Identification Number)
   d) Date of birth
   e) Relationship of each dependent (spouse, children, parents, or other dependents)

2) Income Information (Taxpayer and spouse – if both spouses are employed. Compile all forms that are applicable)
   a) Form W-2 (Wage and Tax Statement). You should have received this from your employer. If you have worked with multiple employers, please compile all W-2s received for the year.
   b) Form W-2G (Certain Gambling Winnings). You will need this if you have any lottery or gambling winnings.
   c) Form 1099-INT/DIV (Interest and Dividend Statement). You should have receive this from your bank or financial institution.
   d) Form 1099-R (Distributions from Pensions, Annuities, Retirement or Profit-Sharing plans, IRAs, Insurance contracts etc). If you have rolled over an IRA or other retirement plan, you will need the documentation for the roll-over as well.
   e) Form 1099-G (Certain Government payments). You will need this if you have received any unemployment compensation
   f) Form 1099-MISC (Miscellaneous Income)
   g) Schedule K-1 – If you have income from Partnerships, LLCs or S-Corporations, you should have received a K-1
   h) Annual Statements from all brokerage accounts showing all stock activity for the year
   i) If you own any investment real estate on your (or spouse's) personal name, you will need the details for the property (property address, residential or commercial, purchase settlement statement, annual rental income, associated expenses)
   j) Any other relevant documents showing income not shown above (such as income from foreign sources)

3) Deductions
   a) Form 1098 – Mortgage Interest Statement
   b) Form 1098-E - Student Loan Interest Statement – If you paid more than $600 in student loan interest, you will receive this form from the financial institution that has your loan
   c) IRA contributions
   d) Personal Health Insurance payments (if self employed) – your own documentation, statement from insurance company
   e) Residential property tax statement (could be part of 1098, if not provide statement from county, city etc)
   f) If you have purchased a new home or refinanced an existing home in the last year, you will need pages 1 and 2 of the HUD settlement statement
   g) Automobile Ad-Valorem taxes (usually paid with registration around one's birthday)
   h) Charitable contributions in cash – please list each contribution separately. List contributions in kind separately
   i) List of non-reimbursed job related expenses (mileage, travel etc)
   j) Day care expense amount [also provide Provider's Name, Address, Federal Id Number(s) or Social Security Number(s)]
   k) Any other relevant documents showing valid deductions not shown above

4) Other Documentation
   a) If taxpayer needs a direct deposit of the refund to their bank account, taxpayer will need to provide a copy of a VOID check 

      of the account where the refund is to be deposited.
   b) If taxpayer is self-employed please also provide in writing the following
      i) The 4 quarterly estimated tax payments made to the federal and state tax authorities
      ii) Estimate of income and expenses for the current year in order to calculate the estimated taxes for the current year

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c) If the taxpayer requires a paperless filing (e-filing), taxpayer will need to complete and return the PIN form with a PIN number of choice. Returns CANNOT be filed electronically without this form
d) If the previous year's tax returns were not prepared by our firm, we will need a copy of last year's tax returns

PERSONAL ESTIMATED TAX CHECKLIST

The following is a checklist of information all taxpayers will need in order to calculate their personal estimated taxes to be paid in 4 quarterly installments. Taxpayers will need to compile this information if they owned a pass-thru entity (Such as a S corporation or LLC treated as a S corporation or partnership). Taxpayers will also need to compile this information if they earn any income as a self employed individual or independent contractor on a 1099.

5) Personal information (Taxpayer, each dependent and spouse)
   a) Full Name
   b) Address
   c) Social Security Number (Taxpayer Identification Number)
   d) Date of birth
   e) Relationship of each dependent (spouse, children, parents, or other dependents)

6) Income Information (Taxpayer and spouse – if both spouses are employed. Compile all that are applicable)
   a) Annualized estimated income of the taxpayer's or spouse's company (S corporation or LLC)
   b) Annualized estimated income of the taxpayer's or spouse's 1099 income

7) Deductions
   a) Annualized estimated expenses of the taxpayer or spouse's company (S corporation or LLC) (Common expenses such as advertising, auto expenses, bank charges, books, commissions, dues, legal & professional, meals & entertainment, office supplies, parking, printing, postage, telephone, training, pension & retirement, salaries, travel, per-diem etc)
   b) Annualized expenses of the taxpayer or spouse's 1099 (Common expenses such as advertising, auto expenses, bank charges, books, commissions, dues, legal & professional, meals & entertainment, office supplies, parking, printing, postage, telephone, training, pension & retirement, salaries, travel, per-diem etc)

8) Other Documentation
   a) Copy of the pay slip of the last company the taxpayer or spouse worked at during the current year.
   b) If the previous year's tax returns were not prepared by our firm, we will need a copy of last year's tax returns

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