

FREQUENTLY MISSED INFORMATION

1. Client, spouse, and dependent(s) date of birth.
2. Client and spouse occupation.
3. If filing a married or joint return, make sure all documents are identified as to the person the income or expense belongs to.
4. Ad valorem tax on all vehicles, motorcycles, trailers, motor homes, etc.
5. Auto/vehicle mileage- total miles driven entire year and total miles driven for business purposes.
6. Actual auto expenses if not using standard mileage rate.
7. Auto interest paid for self-employed individual s
8. 1099-B- All pages.
9. Closing Statements - All pages of all purchases and sales. For sales, need original closing statement when purchased.
10. Basis of stocks with date purchased and date sold.
11. If available, an Excel spreadsheet from brokerage firm on disk or e-mail.
12. Mortgage Interest Statements - Back of page sometimes has the real estate taxes paid.
13. Real Estate Taxes if not paid by mortgage lender.
14. Charitable mileage.
15. Non-Cash Contributions - Need name and address of organization donated to, description of donated items (good/new condition), date of donation, and value of donation.
16. All income: W-2's, 1099's, unemployment, interest, dividends, stock sales, rental property, self-employment, etc.
17. Self-employed individuals: Need total income, list of expenses with totals, business assets purchased and sold with dates and amounts, health insurance premiums, etc.
18. Home Office Expenses
19. Rental Property: Total rental income received, new assets, insurance, HOA fees, RE Taxes, mileage, land value, expenses.
20. Estimated Taxes Paid: Both Federal and State with dates and amounts paid.
21. County of residence.
22. State income taxes paid and State income tax refund amounts.
23. Refinancing Points and number of years of mortgage.
24. Medical mileage.
25. Medical insurance premiums.
26. K-1's.

PLEASE SEE OUR WEBSITE www.baroncompanies.net FOR HELPFUL TAX WORKSHEETS.