



Cannon Tax & Accounting, Inc. Tax Return Checklist

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704-849-2199 -- www.cannonadvisors.com

Personal Information:

- Change of address / Change of occupation
- Current email address
- Current phone numbers
- Change in filing status
- Add / Remove dependent(s)
- Drivers license / State ID number and state issued

New Client:

- Copy of prior year tax return
- Voided check for direct deposit of refunds
- Date of Birth (All family members)
- Prior year tax prep fee

Income and Source Forms:

- Wage Statements - Form W2
- Interest Income - Form 1099-INT
- Dividend Income - 1099-DIV
- Sale of Stock - 1099-B
- Receive any alimony
- Unemployment - Form 1099-G
- Jury Duty pay
- Receive a state income tax refund - Form 1099-G
- Cancellation of debt - Form 1099-C
- Gambling winnings - Form 1099-G or W2G
- Pension or Retirement distributions - Form 1099-R
- Social Security - Form 1099-SSA
- Sole proprietor income - Form 1099-MISC
please see business worksheet
- Rental Property / please see rental worksheet
- Partnership/Trust/Estate/S-Corp - Form K-1
- Sell a Property/House - Form 1099-S
please bring Hud-1 from the sale and need
initial purchase price and date
- Foreign Bank account detail
- Receive an inheritance OR death benefit

Tax Payments:

- Any Federal and/or State Estimated Tax Paid
~need amount and date paid for each quarter
- FAFSA - Let us know if you need your return
completed for FAFSA.

General:

- Moving Expenses (Active Military Only)
- Pay any alimony - amount and who paid to SS#
- Full time educator (K-12), need educator expenses
- Student loan interest
- Student tuition - Form 1098-T

Deductions:

- Medical expenses - please see medical worksheet
- Property Tax on Real Estate
- Mortgage Interest
- Purchase a new house - Form HUD-1
- Property Tax on vehicles
- Dollar contributions
- Non-cash contributions
- Volunteer Expenses / Miles
- Year end (December) statements for IRA / Roth
- Gambling losses (deduct up to winnings)
- Childcare Expenses / Provider information
- Any Improvements that may qualify for an
energy credit

Healthcare:

- Was the family covered the entire or partial year
- Receive a Form 1095-A, 1095-B, 1095-C
- Contribute to a Health Savings account
- Contribute to a long-term care account

Tax Savings:

- Interested in contributing to an IRA if eligible?
- If you are self-employed - Interested in contributing
into a retirement account?

If you are interested in any of the tax saving
strategies below please let us know.

- Retirement Planning
- Inheritance Planning
- IRA Rollover / Job Change
- Will / Trust Planning
- College Savings

Note: Please see the additional worksheets that go into more detail on several items above.

Additional material may be requested from you during the interview process or for clarification.

Questions??? Please call 704-849-2199 or email admin@cannonaccounting.com