



**WILMOTH**  
**& ASSOCIATES, P.A.**  
*accounting for your needs!*

Lakeshore Executive Center  
2317 Blanding Blvd., Suite 206  
Jacksonville, Florida 32210  
Phone: 904-633-9222  
Facsimile: 904-633-9060

**List of Tax Information Needed to Prepare 1040's**

- \_\_\_ Name(s), Social Security Number(s), and Birth Date(s) of Taxpayer(s)
- \_\_\_ Name(s), Social Security Number(s), and Birth Date(s) of Dependent(s)
- \_\_\_ Copy of prior year's tax return
- \_\_\_ Form W-2's
- \_\_\_ Form 1099's
  - \_\_\_ 1099INT (Interest Income)
  - \_\_\_ 1099DIV (Dividend Income)
  - \_\_\_ 1099R (Distributions from Pensions, Annuities, Retirement or Profit-Sharing Plans, IRA's, Insurance Contracts, and etc.)
  - \_\_\_ 1099B (Proceeds from Broker or Barter Transactions)
  - \_\_\_ 1099MISC (Miscellaneous Income)
- \_\_\_ Broker Statements showing income from stock sales  
Also provide purchase information of stock sold including purchase date, purchase price, and number of shares purchased.
- \_\_\_ Income and Expenses from self-employment
- \_\_\_ Schedule K-1's
- \_\_\_ Income and Expenses from Rental Properties
- \_\_\_ Social Security Income
- \_\_\_ Disability Income
- \_\_\_ Unemployment Benefits
- \_\_\_ List of Itemized Deductions
  - \_\_\_ Medical Expenses not reimbursed by Insurance
  - \_\_\_ Real Estate Taxes Paid
  - \_\_\_ Mortgage Interest Expense
  - \_\_\_ Charitable Contributions
  - \_\_\_ Unreimbursed Employee Expenses (i.e. uniforms, tools, job travel, job education)
- \_\_\_ Childcare Expenses including the name, address, and federal identification number of the provider
- \_\_\_ Education expenses (include form received from college)
- \_\_\_ Tuition Loan Interest Expense
- \_\_\_ Payment Date and amount of Federal estimated tax payments

*This list is not all-inclusive of the information we might need to prepare your personal tax return, but it is a good start. Please forward any additional information you may feel is relevant in preparing your tax return.*

*Certified Public Accountants*