Tax Info Checklist – What info do we need for your personal taxes?

- ***Our Questionnaire*** – please fill out the individual tax questionnaire, the business tax questionnaire, or both. They can be found on the home page of our website: www.thehardinggroup.biz (in red ovals below the dog)
- ***Tax payments*** – if you made any estimated tax payments for this tax year, extension payments for this tax year, or payments for state taxes for a prior year, please include the amount of the payment, the payee and the date.
- ***W-2s*** for wages
- ***1099-MISC*** for self-employment income
- ***1099-Rs*** for retirement income
- ***SSA-1099s*** for Social Security income
- ***1099s for investment income: 1099-INT, 1099-DIV, 1099-B*** (We don't need year end statements)
- ***1099-G*** for state tax refunds or unemployment benefits
- ***Alimony*** paid or received
- ***Rental Property Info*** including all income, expenses, repairs and improvements; as well as settlement statements for the purchase or sale of a rental property
- ***K-1s*** for income or losses from a partnership, S corporation, trust or estate
- ***Education Expenses and Distributions*** including 1099-Qs and MD College Savings Plan year end statements
- ***Mortgage Interest and Property taxes***
- ***Medical Expenses***
- ***Charitable Contributions***
- ***Childcare expenses*** including the provider's EIN or SSN, the provider's address and the amount paid for each provider; as well as the amount spent for each kid per provider