

CHRISTIAN ACCOUNTANTS

2011 TAX ITEMS

Income Items:

- Employment income (W-2 forms)
- Interest and dividend income (Forms 1099-INT and 1099-DIV)
- Income from sales of stock or other property (Forms 1099-B and 1099-S)
- Retirement income (Forms 1099-R)
- Social security/RRB income (Forms 1099-SSA and RRB-1099)
- Unemployment income (Form 1099-G)
- Non employee income (Form 1099-MISC)

Deduction Items:

- Mortgage Interest Paid (Forms 1098 or other mortgage statements)
- Real estate taxes paid.
- Amount of charitable contributions (Statements showing cash and checks donations)
- Any non-cash charitable donations (Statements showing donations made)
- Union dues paid (also the name of the union).
- Uniforms and other work related expenses.
- Amount of medical expenses paid.
- Amount of college tuition paid either directly or by loans. (Form 1098-T)
- Amount paid for college books and educational equipment needed for undergraduate study.
- Amount of interest paid on college loans. (Form 1098-E)
- Amount of sales tax paid on the purchase or lease of a motor vehicle in 2011.
- Settlement costs relating to sale or purchase of a home in 2011. (Settlement sheets)
- If you are a school teacher, bring the amount paid for classroom supplies.
- Cost of home improvements made which qualify for the residential energy credits.
- Amount of any IRA contributions.
- Child care expenses.
 - Name and address of provider.
 - Social security number of provider (If an individual).
 - Tax ID number of provider (if an organization).
 - Total amount paid to each provider.

Other Items Needed:

- Social security cards for all **new** dependents.
- Tax forms received from the **city** and **local** governments.
- If you desire direct deposit of your tax refund, bring the account number and routing number of your bank account. (**Refund can be split and sent to 3 different bank accounts**).

Note: If you operated a business or were a landlord in 2011, please call (215) 247-0340 or visit www.christianaccountants.com to obtain additional worksheets.