Langley
Financial Services, LLC
A wholly owned subsidiary of
Langley Federal Credit Union

Tax Appointment Checklist

	Description	✓
1.	Last year's tax returns (not necessary for returning clients)	
2.	W-2 Forms	
3.	1099 Forms for interest and dividends, sale of stock/mutual funds	
4.	1099-R Forms for pension and IRA distributions	
5.	Small business income and expenses	
6.	Rental property income and expenses	
7.	Statement of IRA contributions made	
8.	Moving expenses	
9.	Child care expenses	
10.	Settlement statements from purchase and/or sale or refinancing	
11.	Itemized Deductions:	
	- Medical expenses	
	- Real estate taxes	
	- Personal property taxes	
	- Mortgage interest statements	
	- Charitable contributions – cash and non-cash	
	- Unreimbursed job expenses (mileage, meals, supplies)	
	- Job search expenses	
12.	Tuition Savings Plan (529 Plan) contributions and/or Form 1099-Q	
13.	Student loan interest statement – Form 1098-E	
14.	College tuition and fees (Form 1098-T), books and supplies receipts	
15.	Record of federal and state estimated tax payments	
16.	IRS and/or state correspondence received	

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