

CHERI G. DAVID, CPA, CVA

ACCOUNTING FOR YOUR FUTURE

Licensed in
Virginia and California

Certified Public Accountant
Certified Valuation Analyst

INDIVIDUAL TAX RETURN REQUESTED ITEMS **(NOT ALL INCLUSIVE)**

1. W-2's
2. Interest/Dividend Income 1099INT's, 1099, DIV,
3. Capital Gain Income – Any and all brokerage statements please include cost basis if not provided in brokerage statements
4. Any Self Employed Income – 1099MISC statements and Expenses related thereto.
5. Rental Real Estate Income and Expenses.
6. IRA/Pension/Retirement Plan Distributions – 1099R's
7. Did you make any Contributions to IRA's or would you like to contribution if it will save you tax dollars?
8. Did you make substantial improvements to your home?
9. Total of Deductible Medical Expenses – deductible means “medically necessary”
10. Mortgage Interest Statements for all homes/motor homes/vacation homes
11. Real Estate Taxes Paid during the year
12. Property Taxes/Vehicle Registration paid during the year
13. Charitable Contributions
 - a. Cash Contributions, please itemize
 - b. Non Cash Contributions, please provide date of contribution, FMV at time of contribution, donor name and address, detail list of items donated, and what you originally paid for those items.
14. Closing Statements for any real estate purchases or refinancing during the year
15. Any tax notices received from IRS or State tax authority

16. Child Care Expenses? If so please provide the amounts, identification number and to whom expenses were paid.
17. Virginia Residents Only: Please provide 529 Virginia College savings plan contribution statements.
18. Tuition and Fees paid? If so please provide name of child and qualifying expenses or expense statement provided by the school