

Brilliant Deductions
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Charlotte, NC 28209
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Brilliant Deductions Tax Preparation Checklist

Please provide the following Tax documents needed to prepare your return

- | | |
|---|--|
| <input type="checkbox"/> W2 | <input type="checkbox"/> 1099-INT |
| <input type="checkbox"/> 1099-DIV (or 1099-Comp) | <input type="checkbox"/> 1099R |
| <input type="checkbox"/> W2G | <input type="checkbox"/> Taxpayer's RRB-1099 |
| <input type="checkbox"/> Spouse's RRB-1099 | <input type="checkbox"/> Taxpayer's SSA-1099 |
| <input type="checkbox"/> Spouse's SSA-1099 | <input type="checkbox"/> 1099-Misc |
| <input type="checkbox"/> 1099-Misc | <input type="checkbox"/> 1099-Misc |
| <input type="checkbox"/> 1099-Misc | <input type="checkbox"/> 1099-Misc |
| <input type="checkbox"/> 1099-Q | <input type="checkbox"/> 1099-B |
| <input type="checkbox"/> K-1 Partnership | <input type="checkbox"/> K-1 Scorp |
| <input type="checkbox"/> K-1 Trusts | <input type="checkbox"/> 1098 Home Mortgage |
| <input type="checkbox"/> 1099-G Unemployment Compensation | |

Please provide the following information needed to prepare your tax return

- What is your current address? _____
- Did your marital status change before 12/31/2014? _____
- Were there any changes in dependents? _____
- Did you have any child or dependency care expenses? Please include care provider's name, address, SSN, and amount. _____
- Did you buy or sell stocks, mutual funds, bonds, or other investment properties? _____
- Did you buy, sell, or refinance your home? _____
- Did you donate money, clothes, cars, or stock? _____
- Did you incur any tuition or continuing education expenses? _____
- Did you receive a distribution from or make a contribution to a retirement plan (401(k), IRA, etc.)? _____
- Did you and your dependents have health care coverage for the full-year? _____
- Did you receive any of the following IRS documents? Form 1095-A, 1095-B, or Form 1095-C? If so, please send. _____
- For direct deposit, please provide your bank name, routing number, and account number? _____
- Please list any questions or other concerns you might have. _____
- Please write any other information or notes you want us to see. _____