

- General Information
 - Filing Status, Name, Address, Date of Birth, Contact Number, Email Address
 - Dependents (including full name, social security number and date of birth)
 - Bank Information for direct deposit (routing number, account number)
- Electronic Filing
 - Last year's income information
- Income
 - W2's, interest income and dividends
 - Sales of stock or other capital assets (date of purchase and sale, purchase cost, sale proceeds)
 - Distributions from pensions, retirement accounts or other special accounts (1099's)
 - Other Income: Refunds from state returns, social security, and miscellaneous income.
- Business Activity
 - Any small business or sole proprietorship activity
 - Income from activities
 - Expenses:
 - Advertising (including gifts and promotional material)
 - Commissions/Fees (including banking fees)
 - Contract Labor (non-employee wages)
 - Employee Benefits
 - Insurance on the business
 - Interest: Paid to a financial institution/credit card company
 - Legal and Professional Fees (including lawyers and accountants)
 - Office Expense (pens, paper, other "desk" or general office supplies)
 - Pension/Profit Sharing
 - Rent (machinery, autos and other equipment)
 - Rent (other, including office or storage space)
 - Repairs/Maintenance on business property
 - Supplies (catch all for other general supplies for business activity)
 - Taxes/Licenses (all taxes paid by the business – payroll, sales, state, use, personal property, real estate taxes and all licensing)
 - Travel (including airfare and other conveyances and lodging)
 - Meals & Entertainment
 - Utilities (general utilities and telephone/cell phone)
 - Wages
 - Other Expenses (subscriptions, professional development, other expenses not listed elsewhere)
 - Mileage
 - Total miles for the year (all purposes)
 - Business miles
 - Depreciation of business equipment
- Rentals, Farms, Co-ops, Partnerships, Corporations and Trust Activities
- Education (college and university level courses; tuition and books)
- Itemized Deductions

- Medical and Healthcare (including doctor visits, co-payments, dental, glasses/contacts, health insurance, and prescriptions)
- Taxes
 - State taxes withheld or paid directly to any state
 - Real estate taxes paid
 - Personal property taxes (DMV renewal/Tags)
 - Sales tax paid on major purchases of \$1000 or more per item (ex. Electronics, precious metals or gems, or furs.)
- Home Mortgage and Points
- Charity
 - Cash (checks, charges or other payments)
 - Non-Cash (clothing, furniture, other non-cash; ex. Goodwill or Salvation Army)
- Employee Business Expenses (expenses paid out of pocket against W2 income **NOT** reimbursed by employers)
 - Parking fees and tolls
 - Local transportation (taxis, buses, etc)
 - Travel (including airfare and other conveyances and lodging)
 - Mileage (see Schedule C)
 - Meals & Entertainment
 - Other
 - Promotional & Gifts
 - Cell phone and Internet
 - Dry cleaning
 - Marketing fees
 - Subscriptions
 - Green Fees
 - Sundry/Miscellaneous
- Other Expenses
 - Union dues
 - Tax preparation
 - Other/General
 - Safe deposit box/security of household
 - Investment expenses (including legal and financial costs)
- State Return
 - Confirmation of information for state purposes
 - Direct deposit for state purposes
 - Any Income adjustments (preparer's responsibility; takes certain federal deductions and adjusts them for state purposes)