

**Sanderson Accounting, Inc.**  
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Materials needed to prepare your personal or business tax returns for 2011:

Your 2010 federal, state, and city returns. (If we did your taxes last year, we have them on file, and we'll send you the 2011 Organizer packet.)

**For personal returns (Form 1040), select what applies in your case:**

Taxpayer and spouse social security numbers and birth dates

Dependents, with birth dates and social security numbers

**W-2's** - and if you received any unemployment compensation, the 1099-G

**1099's** for interest or dividends

**1099-B's** for sales of securities (Find out what you paid for those investments.)

**1099-MISC's** for income earned as an independent contractor or landlord

**1099-R's** for retirement income

**K-1's** from partnerships, LLCs, S-Corps or trusts

Year-end Social Security statements

**Estimated tax payments** (to federal, state or local governments)

Childcare provider – name, address and federal ID, totals per child

1098's for student loan interest or tuition payments

IRA contributions – deductible or Roth?

Itemized deductions:

Medical expenses, including payments for health or long-term care insurance

State and local income taxes and property taxes paid in 2011

Mortgage interest paid in 2011

Charitable contributions that you can document

Unreimbursed expenses that you incurred for your work or moving

Expenses associated with investments

**Business income taxes:** Business information goes on a Schedule C on your personal return if you're a sole proprietor, a Form 1065 for partnerships or most LLCs, and a Form 1120 or 1120S for corporations. There are other forms for rental or farm income.

Federal ID number

Business name and address

Type of business (what does it do?), and names and other data about owners

Receipts and expenses; bring an income statement and balance sheet if available,

**or we can do the necessary bookkeeping.**

Fixed assets (building, if owned; equipment, furniture, company cars)

Loans and payments for the year, with an amortization schedule if possible

Rental income and expenses

Farm income and expenses

Taxes paid by the business during the year

