



**PASCARELLA & PYRCH-BOWLAN
ACCOUNTING GROUP, LLC**

Personal Check List

CLIENT _____ TAX YEAR _____

The purpose of this worksheet is to help you organize your tax information, in order to prepare your taxes. Pascarella & Pyrch-Bowlan Accounting Group, LLC's staff will still need all the supporting documentation.

Personal Information

Taxpayer's Name	
Soc. Sec. Number	
Birth date	
Occupation	

Spouse's Information

Spouse's Name	
Soc. Sec. Number	
Birth date	
Occupation	

Address	
City	
State	
Zip Code	
Home Phone	
Mobile Phone	
E-mail Address	

Dependents

Dependent's name	
Soc. Sec. Number	
Birth date	
Relationship	

Dependent's name	
Soc. Sec. Number	
Birth date	
Relationship	

Dependent's name	
Soc. Sec. Number	
Birth date	
Relationship	

Dependent's name	
Soc. Sec. Number	
Birth date	
Relationship	

Dependent's name	
Soc. Sec. Number	
Birth date	
Relationship	

Dependent's name	
Soc. Sec. Number	
Birth date	
Relationship	

Child Care Information (Per Child and Provider)

Provider's Information

Name	
Address	
SSN / EIN	
Amount Paid	

DOCUMENTS TO BRING

- W-2 (Wages, Salaries, and Tips)
- Interest Income (1099-INT)
- Dividends (1099-DIV)
- State or Local Tax Refunds (1099-G)
- 1099-MISC Income (Sole Proprietors)
- Capital Gains or Losses
- Investment Income (1099-OID, 1099-R, 1099-B, IRA, 401K, Roth, Pensions, etc.)
- Sales of a Home / Asset (1099-S)
- Rental Properties (Breakdown)
- Social Security Benefits (SSA-1099, RRB-1099)
- Other Income (Gambling Winnings, etc.)
- Deductions (see Schedule A – Itemized Deductions)