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A Helpful Checklist for Preparing for Your Tax Appointment

Office in the Home Information:

1. Compute the total area of your house in square feet (house area) _____
2. Compute the area of the house that is used *exclusively* for business (business area) _____

House Expenses We Need:

What was the original cost of the house?

What was the cost of any improvements?

What mortgage or home equity loan interest did you pay for the year?

If you don't own the home, what rent did you pay?

What real estate taxes did you pay?

Did you pay any association dues?

What did you pay for repairs to the home?

What did you pay to insure the home?

What did you pay for maid service?

What did you pay for landscapers and lawn care?

What did you pay for internet service?

What did you pay for electric, gas, water, and garbage?

Did you have any other expenses that relate to the house?

REMEMBER: UNLESS A SPECIFIC FORM IS NOTED, WE ONLY NEED TOTALS FOR THE ABOVE ITEMS.

WE DO NOT NEED YOUR BOX(S) OF RECEIPTS.