ATC Wegge LTD.

Tax Return Information Checklist

This is a list of the most common documents we will need to complete your tax return. If additional documentation is needed, we will contact you.

You may provide information to our office in the following manner:

- Drop off at our office (Seasonal Business Hours ~ M-F 8:30am-6pm; Saturday 9am-noon)
- Mail to ATC Wegge, Ltd., 265 Center St., Grayslake, IL 60030
- Fax to 847 223-0782
- Email to atc@atcwegge.com

- Notify our firm of any changes in marital status, dependents and or dependent educational changes.
- **Confirm that your current dependents are not filing their own return and claiming themselves or an ex-spouse is not claiming them.**
- All W-2's for taxpayer and or spouse.
- All 1099 forms received confirming income from interest, dividends, retirement, Social Security, disability, unemployment, gambling winnings, etc.
- All income information for children whose tax return(s) you want us to prepare.
- Year-end statement of mortgage interest (Form I098), escrow activity and balance on mortgage or home equity loans.
- Real Estate taxes paid.
- Total of charitable contributions and details for any noncash contributions over $500.
- Copies of all LLC, Partnership or S-Corporation K-1's (these are often received late; let us know if this is true for you)
- Real Estate closing statements of any purchase, sale or refinance transaction.
- Cost basis for the sale of any mutual funds (obtained from year end summary statement); if summary statement is not available, we need a detailed activity of the fund including purchase date & price through sale date & price.
- If you are claiming auto mileage as a deduction for business, rental properties or unreimbursed employee expenses, we need to have a vehicle log showing: total miles, commuting miles, business miles driven for the year, business destination, business purpose and client info if applicable.
- If you lease your car or are deducting actual expenses, please also provide: original value of the car (what you could have bought it for), date of lease and all expenses for lease payments such as gas, licenses, insurance, repairs, etc.
- Copies of any federal, state or local tax correspondence received including any refunds.
- **Detail of any federal or state quarterly estimated tax payments made for the year.**
- All legal documents for incorporation, sale or purchase of a business during the year.
- All legal documents for divorce decrees.
- Voided check (needed only if you will have a direct deposit refund)
- **New Clients:** copy of prior year federal, state, & local tax return including depreciation schedules if applicable.
- **Prior to preparing your tax return, you will be required to sign our firm's Engagement Letters of Services.**
- Please provide any additional documentation that you believe will contribute to the accuracy of your tax return.
- Illinois sales tax not paid on purchases from internet, mail order or other out of state purchases.