

**PLEASE COMPLETE TOP PORTION, USE CHECKLIST BELOW AND BRING TO ITL WHEN DROPPING OFF YOUR TAX RETURN INFO.**

**NAME : (S:)** \_\_\_\_\_

**ADDRESS :** \_\_\_\_\_

**PHONE :** \_\_\_\_\_

**DEPENDENTS :** \_\_\_\_\_

**OCCUPATION : (S:)** \_\_\_\_\_

- 1  YEAR END REPORTING DOCUMENTS: W-2'S, 1099'S, 1098'S
- 2  DECLARATION PAGE FROM HOMEOWNERS INSURANCE POLICY  
(2011 SHOWING LA. CITIZENS ASSESSMENT ) LOUISIANA RESIDENTS ONLY
- 3  OUT OF POCKET MEDICAL EXPENSES (RX'S, CO-PAYS, DR. VISITS, DENTAL,  
VISION ). MEDICAL MILEAGE LOG
- 4  CHARITABLE CONTRIBUTION LETTERS AND RECEIPTS, IE: GOODWILL ETC.  
( MUST BE TO QUALIFIED NON-PROFIT ORGANIZATION )
- 5  UNREIMBURSED EMPLOYEE EXPENSES
- 6  ENERGY EFFICIENT HOME IMPROVEMENTS ( INSULATION, QUALIFIED-CENTRAL A/C,  
WINDOWS, EXT. DOORS - see [www.energystar.gov](http://www.energystar.gov) to verify qualified items )
- 7  STUDENT LOAN INTEREST STATEMENT
- 8  RECEIPTS FOR TUITION AND SCHOOL RELATED FEE'S ( BOOKS, UNIFORMS,  
ETC. ) FOR DEPENDENTS K-12 ( SEPARATE TOTALS FOR EACH CHILD )
- 9  TUITION, BOOKS AND REQUIRED FEE'S FOR POST SECONDARY EDUCATION  
FOR ANY INDIVIDUAL ON RETURN
- 10  PAPERWORK FOR SALE OF PROPERTY, STOCKS, ETC.
- 11  ANY DAYCARE EXPENSES
- 12  VOIDED CHECK FOR DIRECT DEPOSIT OF REFUND OR WE CAN COPY THE  
ONE YOU PAY WITH
- 13  REAL ESTATE / PROPERTY TAXES WHEN ITEMIZING ( LONG FORM )