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THINGS TO BRING FOR TAX PREP

APPOINTMENT – DATE : _____ TIME: _____

1. All copies of W-2, 1099 and K-1 Forms.
2. All Year-end lender loan statements, including refinancing paperwork and form 1098, showing mortgage interest paid.
3. Current year settlement statements if not already provided (for purchase-sale, or loan refinancing of real estate).
4. 1099 Forms reporting all stock sales for the current year as well as purchase date and cost information.
5. 1099 Forms reporting unemployment compensation, state tax refunds and social security benefits.
6. 1099 Forms for all retirement distributions and fund transfers.
7. Social security numbers and dates of birth of all dependents (if not previously supplied).
8. Prior year tax returns for **NEW** clients only.
9. Completed organizer, if supplied.
10. Schedule summarizing business or rental income and expenses, if applicable.
11. Date and amount of each estimated tax payment.
12. Name, address and social security or I.D. number of all child care providers as well as amounts paid for child care.
13. Any IRS or state revenue board correspondence received.
14. Any other documents you feel may be needed.
15. Medical expenses paid: including doctor, dentist, vision, prescriptions and insurance premiums (including long-term care premiums).
16. Real estate taxes paid.
17. Charitable contributions.
18. IRA contributions, note if ROTH or traditional.
19. Form 1095-A, B or C relating to health insurance coverage.

This is a partial list of things necessary to complete an accurate income tax return for you. If you have additional information that you feel is needed please bring it for us to review.