

What do I need to bring with me?

All clients need to bring in any & all...

- ✓ W-2 & W-2P forms (from employers)
- ✓ 1099 & 1099-R forms (from bank, government, etc.)
- ✓ Interest Statements (from bank)
- ✓ 1098-T forms Tuition slips for college (from college)
- ✓ Property tax bills/receipts, both summer & winter (from township or city) (Both paid & unpaid during tax year)

Has your **direct deposit** information changed?

- YES – You need to bring in...
- ✓ Voided check (info from check)

Did you **pay estimated taxes**?

- YES – You need to bring in...
- ✓ Proof of amounts paid (cancelled checks)

Did you **pay on student loans**?

- YES – You need to bring in...
- ✓ 1099-E forms for interest paid (from Financial Institution)

Did you **get married, divorced or change your name**?

- YES – You need to bring in...
- ✓ Your new Social Security Card

Did you **have a new baby or adopt a child**?

- YES – You need to bring in...
- ✓ The child's Social Security Card
 - ✓ Adoption expenses

Did you **pay for child or dependent care**?

- YES – You need to bring in...
- ✓ Day Care provider name, address & ID number (Social Security Number)
 - ✓ Amounts paid

Did you **buy a new home**?

- YES – You need to bring in...
- ✓ Purchase papers / Closing documents

Did you **build a house**?

- YES – You need to bring in...
- ✓ Closing documents
 - ✓ 1098 form before built (construction interest from bank)
 - ✓ 1098 form after built (actual mortgage interest from bank)
 - ✓ Amortization schedule for a land contract
 - ✓ Taxes paid/unpaid on property or through escrow

Did you **refinance a home**?

- YES – You need to bring in...
- ✓ Closing documents
 - ✓ 1098 forms from both mortgage companies

Did you **sell land or property** (house, building, etc.)?

- YES – You need to bring in any & all...
- ✓ Purchase & sale papers (Closing documents)
 - If no purchase papers then the tax return from the year of purchase.
 - ✓ Improvement receipts for land & building
 - ✓ Interest paid - 1098 mortgage forms (from mortgage companies or banks)
 - ✓ Property taxes paid/unpaid (Township or city)

Did you **contribute** after tax dollars to an IRA, SEP, Keogh or 401-K plan to by April 15th?

- YES – You need to bring...
- ✓ The amount you contributed or plan to contribute.
 - ✓ IRA statements (Form 5329)

- All items are based on amounts paid during the tax year, unless otherwise specified. *

What do I need to bring with me?

Did anyone in your household **attend college classes**?

YES – You need to bring in...

- ✓ Form 1098-T from the college

Did you **own a business**?

YES – You need to bring in any & all...

- ✓ Income ledger
- ✓ 1099's received
- ✓ Business expense totals
- ✓ Mileage logs
- ✓ Business bank statements (both checking & saving)
- ✓ Asset/equipment purchase receipts with date of purchase

Did you **own a rental unit** (apartment, house, or condo)?

YES – You need to bring in any & all...

- ✓ Income ledger
- ✓ Rental expense totals
- ✓ Mortgage statements
- ✓ Property taxes paid
- ✓ Improvements
- ✓ Large purchase receipts with date of purchase

Did you **sell any stocks or bonds**?

YES – You need to bring in...

- ✓ Form 1099-B (from brokers)
- ✓ Email us the spreadsheet of sales

Did you **have any unreimbursed employee business expenses**?

YES – You need to bring...

- ✓ Mileage Log for business miles
- ✓ Travel expenses (motel, plane, etc.)
- ✓ Business meals
- ✓ Supplies
- ✓ Business telephone calls

Do you **itemize**? (If you don't know then you probably don't, most people who have a mortgage or donate large amounts will itemize)

YES – You need to bring in any & all items **paid** during tax year...

- ✓ 1098 mortgage forms (from mortgage companies or banks)
- ✓ Interest paid on 2nd home (vacation home, timeshare, etc.) or land contracts.
- ✓ Plate fees for cars & trucks (vehicle registration)
- ✓ Property tax bills (from city or township)
- ✓ Charity receipts for monetary donations (from church, public radio, etc.)
- ✓ Charity receipts for non-cash donations (clothes, furniture, transportation, out of pocket little league, etc.)
- ✓ Medical expense amounts
 - Drugs & Medicines (prescription)
 - Health, Dental, Optical & Extended Care Insurance
 - Dentist, Doctor, Orthodontist, Home Care, Hospital & Lab Fees
 - Hearing Aids & Batteries
 - Glasses, Contact Lenses & Eye Exams.
 - Medical Supplies
 - Transportation Miles
- ✓ Miscellaneous deductions
 - Job related education
 - Employment agency fee
 - Protective work clothing expense
 - Union dues
 - Safe deposit box
 - Tax return fee (we have here)
 - Professional dues
 - Uniforms – cost & cleaning
 - Vocational supplies
- ✓ Did you **have any losses** from fire, lightning, wind, water, car accident & or theft that exceeds 10% of your income?
- ✓ YES – Please let us know

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