

What to bring to your tax appointment...

This is a list of the most common items we will need to prepare your tax returns. We may still ask questions to clarify some items and some additional information may still be needed.

- ___ All return packets or mailing labels sent to you by the various taxing agencies.
- ___ All W-2 forms.
- ___ All 1099 forms received confirmation income from interest, dividends, retirement, social security, disability, unemployment, gambling winnings and others.
- ___ All income information for your children. If you have prepared their return, bring it to.
- ___ Year-end statement of mortgage interest (Form 1098), escrow activity and balance on mortgage or home equity loans and real estate taxes paid.
- ___ Total of all receipted charitable contributions, and details for any non-cash contributions over \$500.
- ___ Copies of all LLC, Partnership or S-Corporation K-1 form. If you have not received them please advise they are not available at this time.
- ___ If you bought, sold or refinanced real estate, then a closing statement for each transaction.
- ___ If you sold any shares of mutual funds and basis information is not provided by the broker, detail all activity in the funds sold from original purchase date through date of sale (year-end summary statements are ideal).
- ___ If you are claiming auto mileage as a deduction for business, rental properties or unreimbursed employee expenses, we need to know: total miles, commuting miles, and business miles driven for the year. Remember in 2008 the mileage rate changed July 1, 2008 so we will need mileage for January 1 through June 30 and July 1 through December 31.
- ___ Copies of any federal, state or local tax correspondence during the year, including all payments made or refunds received.
- ___ All legal documents for formation, sale or purchase of a business during the year.
- ___ All legal documents for divorce decrees.
- ___ Banking information for direct deposit of refunds.
- ___ **New clients:** Copies of prior federal or state returns and depreciation schedules if applicable, at least one year).