CHECKLIST
CHECK ONLY THOSE THAT APPLY

IF YOU ARE A NEW CLIENT: Please bring copies of social security cards for all persons being claimed on your return. Also, please bring a copy of your last year's tax return. There is information that must be "brought forward", especially any business or rental assets.

- **All W-2s, W-2Gs, 1099s, (such as 1099-R, MISC, INT, DIV, B), Social Security Statements, Unemployment Compensation , and 1099-As or 1099-Cs (for foreclosure or short sales).** ***Do not tear apart W-2s or 1099s, keep them intact!***

- **All 1098 Mortgage Interest Statements**

- **Property Taxes:** if not paid through the escrow account. If paid through escrow, it will be on you mortgage statements.

- **DMV fees for registration on <u>all</u> vehicles and trailers**

- **Receipts for <u>all</u> major purchases (for sales tax purposes only):** Vehicle, furniture, major appliances, or major home repairs and improvements. If there is no sales tax we do not need that receipt.

- **Gifts to charity by cash or check, and also any items donated (Goodwill, Salvation Army, Amvets, etc.):** For cash or check charities, you must have statements or receipts from the charities for amounts over $250.00. For non-cash items you will need a receipt from the charity with a detailed list of all items donated. If the value is listed on the receipt, it must be written by the charity. If it is blank, LEAVE IT BLANK. All value estimates are calculated as what the item would sell at a yard sale (do not value the item with the original purchase amount).

- **If you purchased or refinanced a home/property:** Bring FINAL closing statement or HUD 1.

- **If you sold a home/property (personal or rental):** We need the FINAL closing Statement or HUD 1 **and** a list of all improvements the entire time you owned the house and anything you did to the home to get it ready to sell.

- **Any medical expenses:** Co-pays, prescriptions, lab work, x-rays, hospital, equipment, eye doctor visits and glasses/contacts, any other medical, dental, or vision expenses, mileage to and from these offices/hospitals, and medical insurance and long-term care premiums you pay out of pocket.

- **Tax preparation fees for preparing last year's taxes if prepared by a different tax office.**

- **If you are claiming head of household filing status:** We need the name, date of birth, social security number, and relationship of the qualifying person. Many errors occur in filling for Head of Household because the taxpayer may not qualify for this status.

- **If you divorced during the tax year:** We need the date the divorce became final.

- **All health insurance information. I.e. 1095-A, 1095-B, and 1095-C.** Bring all received.

BRING ANY OTHER ITEMS YOU FEEL MAY RELATE TO YOUR TAXES LET US DECIDE WHAT TO USE.

WHEN IN DOUBT, BRING IT!