

Checklist of Items Needed to File a Return

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- ✓ Completed Client Information Sheet

 - ✓ Copy of your last years Federal & State Return

 - ✓ W2(s) from all employers

 - ✓ 1099 from business (s)

 - ✓ Distributions from IRA's or other tax exempt savings plan

 - ✓ Receipts or consolidated list of charitable contributions and donations

 - ✓ Inquire if your qualify for an Earned Income Credit (EIC)

 - ✓ Itemized totals of unreimbursed employee expenses

 - ✓ Itemized totals of gambling receipts

 - ✓ Dividend gain or loss of stocks statements

 - ✓ Itemized totals of medical expenses

 - ✓ Social Security Numbers (SSN) for all dependents

 - ✓ SSN or Employment Identification Number (EIN) for Childcare Providers

 - ✓ Address of Childcare provider

 - ✓ Itemized totals confirming amount spent for childcare

 - ✓ Itemized totals confirming college expenses

 - ✓ Mortgage Interest statements of all properties

 - ✓ Itemized list & totals of expenses for your business and their use

 - ✓ Rental income - Itemized list & totals of expenses per rental unit

 - ✓ Mortgage interest statements for each rental property
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