

CHECKLIST OF ITEMS NEEDED TO FILE A RETURN

✓ 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