INFORMATION CHECKLIST

Following is a list of the most common items we'll need to complete your returns. We will call you if we need anything else. *(You don't need to return this to us unless you make notes we should be aware of.)*

___ All W-2's

___ All 1099 forms received confirming income from interest, dividends, retirement, social security, disability, unemployment, gambling winnings, etc.

___ All income information for children if you want us to prepare any required returns.

___ Year-end statement of mortgage interest (Form 1098), escrow activity and balance on mortgage or home equity loans.

___ Total of charitable contributions and **details** for any **non-cash contributions** over $500.

___ Copies of all LLC, Partnership or S-Corporation K-1's (send separately later if everything else is ready and let us know they are coming).

___ If you purchased, sold or refinanced real estate you need a closing statement for each transaction.

___ If you sold any shares of mutual funds or stocks and basis information is not provided by the broker, detail all activity in the funds sold from original purchase date through date of sale date (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:
Auto make/model/year, total miles, commuting miles, and business miles driven for the year.

___ If you lease your car or are not taking the auto mileage above, please also provide:
original value of the car (what you could have bought it for) and date of lease, and
all expenses for lease payments, gas, car washes, licenses, insurance, tires, repairs, etc.

___ 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.

___ Voided check for account where refunds should be direct deposited (optional).

___ **New clients:** Copies of prior federal, state, and local returns and depreciation schedules if applicable (at least one year).

___ If we are reviewing your financial situation please bring your latest statements.

___ If we are reviewing your life insurance please bring your policies.