



If you are a new client, please bring the following:

- *Names, date of birth, original Social Security cards for yourself and your family, driver's license.
- *Copy of the last 3 years tax returns (if possible.)

For both new and returning clients:

1. Records of all income received during the tax year such as:
 - *W-2s for wages, all 1099s for interest, dividends, unemployment benefits, state income tax refunds, Social Security Benefits.
 - *Tip income records.
 - *Records of gambling profits and losses.
 - *Cash income received record (such as from odd jobs.)
 - *Alimony received.
 - *1099 B - Capital gains and losses records, such as brokerage account annual statements. We need purchase date, cost/purchase price, sale date, sale price, if any commissions were paid.
 - *Form K-1s from any estates, partnerships or S-Corporations.
 - *1099 R – IRA's, Pensions and Annuities.
2. Amount of IRA contributions.
3. Amounts paid for child care and to whom (name, address, EIN, phone #)
4. College Tuition and any other education expenses paid for yourself, spouse and Dependents (Form 1098T).
5. Student loan interest paid.
6. Record of any estimated taxes paid to IRS or a State.
7. Property Tax payments receipts.
8. Form 1098s - reporting Home Mortgage Interest and points, Closing Statement (HUD) if purchased, sold or refinanced in the current tax year.
9. Receipts of medical, drug and dental unreimbursed expenses, including medical insurance or long term care insurance premiums.
10. Itemized record of charitable gifts. Any contribution over \$500 must include a signed receipt from the charity. If you donated a car, you need the 1099 that states the value.
11. Any records related to starting or operating your business: income and expenses by category (i.e., rent, taxes, uniforms, tools, equipment, license fees union dues, etc.)
12. Rental Real Estate- Schedule of rental income and expense amounts by category, (i.e. taxes, interest, repairs, capital items).
13. Information regarding Foreign Bank Accounts and other Foreign Assets owned (Bank, Account #'s, Value of accounts@ 12/31/18)
14. Information regarding Health Insurance Coverage (Carrier, Policy #, Etc.) Form 1095-A, B & C if applicable.