



S. Landau Services
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Checklist of Things to Bring to Your Tax Appointment

- Current mailing address, email, phone *especially if changed from last year***
- Last year's tax return (*new clients*)
- Driver's license or passport (copy only if sending) (*new clients*)
- Social Security numbers and dates of birth for all dependents (*new clients/new dependents*)
- W-2 forms for wages and last paystub of the year (if available)
- 1099 forms for interest, dividends, retirement, unemployment, stock/mutual fund sales, gambling and other income
- Year-end statements from mutual funds and brokerage accounts
- IRA year-end statements
- K-1 forms from partnerships, S corporations, estates and trusts
- Rental or self-employment income and expenses
- Purchase and sale information for anything sold during the year (car, eBay, etc.)
- Closing document/HUD statement from purchase, sale, or refinance of your home
- Information relating to foreign income and/or foreign bank accounts
- All other statements of income
- Medical expenses (*if anticipated to exceed 7.5% of your income*)
- 1099-SA from Health Savings Accounts showing amounts distributed to you
- Health Insurance Verification Forms [Form 1095-A, 1095-B, and/or 1095-C]
- Records of estimated taxes paid (dates and amounts)
- Property tax statements
- 1098 forms for mortgages or home equity lines of credit; **we'll also be asking you how the funds are being used**
- Donations of money to charity (*letter from organization for any single gift of \$250 or more*)
- Donations of property to charity (*letter from organization for any single gift valued at \$250 or more*)
- Volunteer expenses and mileage
- Washington residents*: RTA tax from vehicle registration
- Amounts related to higher education (including Form 1098-T for tuition paid, 1098-E for student loan interest, and/or 1099-Q for 529 plan distributions)
- Investment-related expenses
- Child care provider's name, address, taxpayer identification number, and amount paid (including amounts paid for summer day camp)

New!

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Advisory Services offered through H.D. Vest Advisory ServicesSM

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