Tax Appointment Reminder

CHECKLIST OF NECESSARY DOCUMENTS
✓ New Clients: Last 3 Years Tax Returns. (FREE REVIEW) ✓ New Clients: Social Security Card(s) or ITIN Letter(s) ✓ Dates Of Birth For All ✓ W-2 Forms For Wages ✓ 1099 Forms For Income ✓ Year-End Statements From Mutual Funds, and/or Stocks, IRA ✓ K-1 Forms From Partnerships, Corporations, & Estates ✓ Rental or Self-Employment Income and Expenses ✓ Purchase and/or Sale Information For Anything Sold During The Year ✓ All Other Statements Of Income (ex: Interest, Dividend) ✓ Medical Expenses (Out of Pocket), 1095 Form (If Applicable) ✓ Record Of Estimated Taxes Paid ✓ Property Tax Statements ✓ 1098 Forms For Mortgage or Student Loan Interest ✓ Donations To Charity ✓ Volunteer Expenses and Mileage ✓ Higher Education Tuition (Form 1098-T) and Book Payments ✓ Unreimbursed Job and Investment Related Expenses ✓ Child Care Provider's name, Address, SS # or Tax ID, and Amount Paid ***May require other documents after review of information.**

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