

What do I bring to my appointment?

Employees

- **Copy of prior year tax return. a must!!**
- W-2's
- All form 1099's from banks and brokerage firms, IRA's etc.
- Cost basis of all mutual funds and securities sold (very important).
- Form 1098 mortgage interest
- Medical expenses
- Unreimbursed business expenses
- Charitable contributions
- Real estate taxes paid
- Other misc. itemized deductions, (talk to me first).

Self-Employed

- Cash receipts
- Cash disbursements, summarized by category
- Miles driven for business
- Total assets acquired during the year.
- Health insurance paid.
- Schedule of all fixed assets along with depreciation schedule.
- All credit card charges for business.
- Log book of meals and entertainment during the year. If necessary.
- List of all individuals who received more than \$ 600.00 per year in self-employment income during the year along with their social security numbers, total income received and address.
- Square footage of home office compared to square footage of house.

Rental Property

- Total rent received
- Cash disbursements by category
- Fixed asset schedule complete with depreciation schedule.
- Percentage rental versus personal if applicable.

Other

- Child care provider, name, address and federal ID number. Total dollars spent on child care.
- Alimony paid or received.
- State taxes paid or refunds.
- Unemployment compensation.
- Form K-1's from partnerships and Subchapter S corporations.
- Contributions to IRA's SEP's and Keoghs.
- Estimated payments made to IRS and State
- Student loan interest.
- Moving expenses.
- Tuition expenses
- Casualty and theft losses.

This is just a partial list to get started. Please complete the tax questionnaire form located on this website and bring it in with you at your appointment. If any additional items are required I will inform you.