What do I bring to my appointment?

Employees

- **Copy of prior year tax return!!**
- 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 miscellaneous 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 their addresses
- 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 of rental versus personal if applicable

Other

- Child care provider, name, address and federal ID number and 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

For Preparation of Business Returns

- **Copy of prior year tax return**
- Articles of Incorporation and Bylaws
- Operating Agreement
- Depreciation Schedules
- Lease Agreement(s)
- Loan Agreement(s)
- Tax elections and related approvals

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.