

2019 Information Checklist

This is a list of the most common items we will need to finish your returns. We will call you if we need anything else.
(You do not need to return this to us; unless you make notes we should be aware of.)

___ Complete Client Questionnaire

___ All return packets or mailing labels sent to you by the various taxing agencies

___ All W-2's

___ All 1099 forms received confirming income from interest, dividends, retirement, social security, disability, unemployment, gambling winnings, etc.

___ All information for children if you want us to prepare their required returns

___ Proof of health insurance coverage for all individuals claimed on your tax return

___ Year-end statement of mortgage interest (Form 1098), escrow activity and balance on mortgage or home equity loans and real estate taxes paid

___ Total of all receipted charitable contributions and details for any non-cash contributions over \$500

___ Copies of all LLC, Partnership or S-Corporation K-1's (send separately later if everything else is ready, and let us know it's coming)

___ If you bought, sold or refinanced real estate, please provide closing statement for each transaction

___ If you sold any shares of mutual funds and basis information is not provided by the broker, detail all activity in the funds sold from original purchase date through date of sale (year end summary statements are ideal)

___ If you are claiming auto mileage as a deduction for business, rental properties or unreimbursed employee expenses, we need to know: total miles, commuting miles, and business miles driven for the year

___ If you lease your car or are deducting actual expenses, please also provide: original value of the car (what you could have bought it for) and date of lease, as well as all expenses for lease payments, gas, car washes, licenses, insurance, tires, repairs, etc.

___ Copies of any federal, state or local tax correspondence during the year, including all payments made or refunds received.

___ All legal documents for formation, sale or purchase of a business during the year

___ All legal documents for divorce decrees

___ Voided Check for account where refunds also should be direct deposited (optional)

___ **New Client: copies of prior federal, state and local returns and depreciation schedules if applicable. (at least one year, preferably three)**