

New Client Information

Please be sure to bring the following to your tax appointment

1. Name, Birthdays, and Social Security Numbers for yourself, spouse and all dependents.
2. Job Title for yourself and spouse
3. Bank Account information if you would like direct deposit
4. Was everyone on your return covered for health insurance for the full year?
5. W2's for all jobs held in 2016 or 1099-MISC for any self-employment
6. Form 1099-R for any withdraws from retirement accounts
7. 1099-INT/DIV for any interest or dividends earned on bank accounts
8. 1098 for mortgage interest paid on your main home/2nd home/rental properties
9. Property taxes paid for your main home/2nd home/rental properties
10. Donations made in 2016
11. A list of any miscellaneous out of pocket work expenses
12. Medical/Dental/Vision expenses (must meet 10% of your income)
13. Child care provider name, address, and EIN # (if applicable)
14. Form 1098-T if you or anyone on your return attended college in 2016
15. Did you make any energy efficient changes to your house in 2016? If so please bring receipt showing what was done to receive the energy credit up to \$500.00
16. If you own a business, please bring all income and expenses totaled and categorized for the year
17. If you own a rental property, please bring all income and expenses totaled and categorized for the year including when you purchased the home and how much you paid for it

We look forward to helping you with your tax preparation needs. Please do not hesitate to reach out with any questions or concerns you may have.

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