

TAX APPOINTMENT REMINDER

Your tax appointment is scheduled for the date and time listed below:

DAY _____ DATE _____

TIME _____

CHECKLIST OF THINGS TO BRING:

- ✓ Last year's tax return (new client)
- ✓ Social Security numbers and dates of birth for all dependents
- ✓ W-2 Forms for wages
- ✓ 1099 Forms for interest, dividends, retirement, Social Security, unemployment, & other income
- ✓ Year end statements from mutual funds
- ✓ K-1 Forms from partnerships, corporations, & estates
- ✓ Rental or Self employment income and expense
- ✓ Purchase and sale information for anything sold during the year
- ✓ All other statements of income
- ✓ IRA year end statements
- ✓ Medical expenses
- ✓ Records of estimated taxes paid
- ✓ Property tax statements
- ✓ 1098 Forms for mortgage or student loan interest
- ✓ Donations of money to charity
- ✓ Donations of property to charity
- ✓ Volunteer expenses and mileage
- ✓ Amounts paid for higher education
- ✓ Job related expenses
- ✓ Investment related expenses
- ✓ Child care provider's name, address, Social Security number, and amount paid