

Things to Bring List

Be Sure to Bring All of the Following with You:

- 1. All Copies of W-2
- 2. 1099 forms reporting all:
 - Interest and Dividends from Savings Accounts, Money Markets, Mutual Funds, Stocks, Bonds, Etc.
 - Non-Employee Compensation
 - Unemployment Compensation (Insurance)
- 3. 1099 forms reporting all Stock sales for 2016 as well as original purchase date and cost information
- 4. 1099 forms for all Retirement Fund Transfers and Social Security benefits
- 5. Social Security numbers and dates of birth of all dependents (if not previously supplied)
- 6. Copies of all K-1's (Partnership and S Corporation)
- 7. Schedule summarizing business or rental income and expenses if applicable
- 8. Date and amount of each estimated tax payment made
- 9. Name, address and I.D. or Social Security number of all child care providers and amounts paid for each child per provider
- If you are claiming the Earned Income Credit, Child Tax Credit, or American Opportunity Credit you are now required to submit one of the following documents per qualifying child:

Residency of a Qualifying Child:

- School Records or Statement
- Landlord or Property Management Statement
- Health Care Provider Statement



- Medical Records
 - Child Care Provider Records
 - Placement Agency Statement
 - Social Service Records or Statement
 - Place of Worship Statement
 - Indian Tribal Official Statement
 - Employer Statement
10. Itemized Deductions:
- Medical Expenses
 - Real Estate Taxes
 - Mortgage, Home Equity and Investment Interest
 - Contributions, Cash, and Non-Cash
 - Casualty and Theft Losses
 - Unreimbursed Employee Expenses
 - Tax Preparation Fee for 2015 & Investment and Safe Deposit Expenses
11. Copy of 2015 Tax Return (for new clients only)
12. Closing Papers for:
- Purchase of New Residence
 - Sale of OLD Residence in 2016
 - Any Refinancing that occurred in 2016
13. Moving Expenses
14. Year End IRA and 401K Statements
15. December 31, 2016 Non – Retirement Investment Statements
- Copy of a valid Driver's license (if filing a joint return you must provide a copy of your spouse's Driver's license also)