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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 & 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 2022 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
- 9. Name, address and I.D. or Social Security number of all child care providers and amounts paid for each child per provider
- 10. Itemized Deductions:
 - Medical Expenses
 - Real Estate Taxes
 - Mortgage Interest
 - Home Equity Interest
 - Investment Interest
 - Contributions, Cash and Non-Cash
- 11. Copy of 2021 Tax Return (for new clients only)
- 12. Closing Papers for:
 - Purchase of NEW Residence
 - Sale of OLD Residence in 2022
 - Purchase of OLD Residence
 - Any Refinancing done in 2022
- 13. Alimony (paid or received) - Need to/from name, Social Security number, amount and date of original settlement
- 14. If assigned, the IRS issued Identity Protection PIN for Taxpayer and/or spouse for Tax Year 2022
- 15. Year End IRA and 401K Statements