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Items to bring for preparation of your Tax Returns

| General Income Items | | Employee Business Expenses |
|--|---|---|
| W2 Forms Interest Income (Form 1099-INT) Dividend Income (Form 1099-DIV) Business Income (Form 1099-MISC) Income from S-Corp, LLC or Partnership (Form K1) Retire Income (Form 1099-R) Social Security Income (Form SSA) Alimony Received Other Income | | Car Miles (or actual expenses) Travel Meals & Entertainment Supplies Telephone Internet Dry Cleaning Computer Other Expenses |
| Stock Sales | Mutual Fund Sales | Child Care Credit |
| Name of Stock Buy Date Sell Date Sell Amount Buy Amount | Name of Mutual Fund Sell Date Sell Amount Average Cost Basis | Amount paid for each child Name of Child Care Provider Address of Child Care Provider Federal ID # of Provider |
| Rental Property | 1099 Contractor or Business | Tax Credits |
| Rents Received Mortgage Interest Real Estate Taxes Insurance Auto & Travel Expenses Cleaning & Maintenance Repairs Supplies HOA or Condo Fees Commissions Management Fees Legal & Professional Utilities | Total Income Advertising Car Miles (or actual expenses) Cleaning & Maintenance Commissions Insurance Legal & Professional Repairs Supplies Taxes & Licenses Telephone Internet Services Office Expenses Home Office Expenses Other Expenses | Tuition Expenses Resident Home Energy Improvements Hybrid Car Purchase |
| Special Deductions | Itemized Deductions | Dependents |
| Moving Expenses Tuition Student Loan Interest Alimony Paid S/E Health Insurance Teacher Expenses Health Savings Account | Mortgage Interest Real Estate Taxes PMI Insurance State Taxes Contributions - Cash Contributions - Non-Cash Medical Expenses | Name of Child Date of Birth Social Security Number |
| | | Other |
| | | Adoption Expenses Investment Interest & Expenses Tax Preparation Fees Job Hunting Safe Deposit Box Gambling Income Sale of Real Estate In-Home Nanny (Wages Paid) Health Insurance Flexible Spending Long-Term Care Insurance Any other relevant information |

New Clients: PLEASE BRING A COPY OF LAST YEAR'S TAX RETURN.

PLEASE LET ME KNOW IF YOUR ADDRESS HAS CHANGED.

Also bring in any other documents marked "Important Tax Information" on the envelope.
In addition, please bring in any other information that you feel may be relevant to the preparation of your tax returns.