

Long Beach/Belmont Shore - San Dimas

Most Important & Commonly Forgotten Items

Existing & New Clients:

- ___ W2's
- ___ Mortgage Interest Paid \$ (all 1098 Forms)
- ___ Property Taxes Paid \$
- ___ SS#'s for Newborns
- ___ Day Care Tax ID#
- ___ DMV (Car Registration) for all Cars, boats, trucks, trailers, jet skis, etc
- ___ Student Loan Interest Paid
- ___ Tuition
- ___ Final Closing/Settlement Statement for New Purchase or Refinance. If you are not sure what this is or where to find it, call your escrow company and they should be able to fax or email it to you.
- ___ Deduction Sheets that apply to you

New Clients Only:

- ___ All of the Items above
- ___ The last 2 years of tax returns
- ___ If you can't find last years tax return, we at least need the amount of the tax you received or paid from the State only from the previous tax year.
- ___ Any & All SS#'s and Birthdates for any spouses or dependants
- ___ Checking Account # and Routing # for direct deposit of your refund

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