



Most Commonly Forgotten items:

- ___ Returning clients - Thumb Drive from Previous Years
- ___ W2's and other Earned Income Statements
- ___ Mortgage Interest Paid
- ___ All other 1099 forms
- ___ Property Taxes Paid on all Real Estate owned
- ___ SSN#'s for Newborns or new Dependents
- ___ Day Care Tax ID#
- ___ DMV (Car Registration) for all Cars, Boats, Trucks, Trailers, Jet Skis, etc. Student Loan Interest Paid
- ___ 1098T and all Qualified Student Expenses
- ___ HUD1 Closing Statement for New Purchase, Refinance, and/or Sold Real Estate
- ___ Checking Routing & Account number for direct deposit of your refund
- ___ End of Year Investment Statement
- ___ Retirement Savings Contributions (not deducted from Paycheck)

New Clients

- ___ SSN's and Birth-dates for spouse or dependents
- ___ The last 2 years of tax returns

Active Duty Military Members

- ___ If you have had an Military Move, filled out Move Worksheet

If you have Rental Real Estate Property

- ___ 1098 Mortgage Interest Statement
- ___ Rental Real Estate Worksheet

Small Business Owner

- ___ Articles of Organization if opened in this last year.
- ___ Articles of Amendments if changes have been made in the last year.
- ___ Small Business Worksheet