



Tax Appointment Checklist/Fax Cover Sheet

Taxpayer: _____ Spouse: _____

Checklist for items to bring to your appointment

<input type="checkbox"/> Last year's Tax Return	<input type="checkbox"/> Sched C Worksheet (for Business Only), call for Sched C Worksheet or download from our website
<input type="checkbox"/> W2's (all copies) - Wages Income (including W2G, Gambling Winnings) # copies _____	<input type="checkbox"/> Unreimbursed Employee Expenses
<input type="checkbox"/> K-1's (all copies) # copies _____	<input type="checkbox"/> 1098 Mortgage Interest Paid (include 2nd Mortgages, Home Equity Loans and Refinances)
<input type="checkbox"/> 1099-INT - Interest Income from CD's, Savings and Checking accounts # copies _____	<input type="checkbox"/> Real Estate Tax Paid (usually reported on 1098)
<input type="checkbox"/> 1099-DIV - Dividend Income from Mutual Funds and Stocks # copies _____	<input type="checkbox"/> Personal Property Tax Statement or Amount Paid \$ _____
<input type="checkbox"/> 1099-R - Pension, IRA and 401(k) Withdrawals # copies _____	<input type="checkbox"/> 1099-S Home Sale/Purchase/Refinance w/long Settlement Statement
<input type="checkbox"/> 1099-B - Mutual Fund and Stock Sales Cost Basis for Investments Sold # copies _____	<input type="checkbox"/> Medical Expenses including Medical Mileage
<input type="checkbox"/> Rental Real Estate Property (call for special organizer form or download from our website)	<input type="checkbox"/> Charitable Contributions - Cash, Check and Non-Cash (clothes, household items, etc.)
<input type="checkbox"/> 1099-G Unemployment Benefits	<input type="checkbox"/> Long-Term Care Insurance Premiums
<input type="checkbox"/> 1099-G State Tax Refunds	<input type="checkbox"/> Estimated Payments (Federal & State) Detail
<input type="checkbox"/> 1099SSA - Social Security Benefits (Pink Form) # copies _____	<input type="checkbox"/> Child Care Expenses (Name, Address, & Fed ID# required)
<input type="checkbox"/> Teacher Classroom Expenses	<input type="checkbox"/> 1098T - College Tuition expenses # copies _____
<input type="checkbox"/> Sales Taxes Paid (Car, Boat, etc.)	<input type="checkbox"/> Student Loan Interest Paid
<input type="checkbox"/> Copy of "VOID" check if you would like Direct Deposit	<input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____

Please provide any additional information necessary to prepare your return

This Checklist/Cover Sheet and all required documents can be mailed to our office at:

The Gamblin Group, LLC
400 N Fourth St
Suite 215
Saint Louis, MO 63102

Or faxed to us at **855-649-1930**

If you have any questions, please call us at **(314) 657-0867**