Check list of items needed

✓	Completed Client Information Sheet
✓	Copy of your last year's Federal & State Return
✓	W2(s) from all employers
✓	1099 from business (s)
✓	Distributions from IRA's or another tax-exempt savings plan
✓	Receipts or consolidated list of charitable contributions and donations
✓	Inquire if you qualify for an Earned Income Credit (EIC)
✓	Itemized totals of unreimbursed employee expenses
✓	Itemized totals of gambling receipts
✓	Dividend gain or loss of stocks statements
✓	Itemized totals of medical expenses
✓	Social Security Numbers (SSN) for all dependents
✓	SSN or Employment Identification Number (EIN) for Childcare Providers
✓	Address of Childcare provider
✓	Itemized totals confirming amount spent for childcare
✓	Itemized totals confirming college expenses
✓	Mortgage Interest statements of all properties
✓	Itemized list & totals of expenses for your business and the purpose
✓	Rental income - Itemized list & totals of expenses per rental unit
✓	Mortgage interest statements for each rental property

- ❖ All tax information must be submitted to the office via email, fax, priority mail, or personal portal prior to your schedule conference call.
- ❖ Your information must be itemized with totals. If expenses are not itemized the accountant may charge hourly to complete the itemization.
- ❖ We recommend that you hold onto all receipts for a statute of limitation period of 3 years.
- ❖ All payments are due once services are rendered and prior to delivery.