Nick Storhaug
CERTIFIED PUBLIC ACCOUNTANT

502 Main Street, Suite B
PO Box 669
Lisbon, ND 58054
Phone: 701-683-5303 Fax: 701-683-4315
nick@storhaugcpa.com

Important things to include with your Tax Appointment

- ☐ Last Year's Tax Return (if new client)
- ☐ Social Security #'s and Birthdates of Taxpayer, Spouse, Children (new clients or new child)
- ☐ 1099 –R retirement income
- ☐ 1099 K – Merchant Card and Third Party Network Payments
- ☐ Any 1099 –C, 1099 -Misc, 1099 – INT, & any other 1099 form showing income
- ☐ Any Brokerage Firm Statements
- ☐ Property Tax Statement for property tax paid during tax year (if you itemize)
- ☐ Closing Statement (HUD) for purchase or sale of a home
- ☐ W-2 for Wages
- ☐ W-2G for Gambling Winnings
- ☐ Last Pay Stub of the Year
- ☐ K-1 from Partnerships, Corporations or Estates
- ☐ If a Charitable Donation is over $250 the taxpayer must obtain a letter from the charity showing that no goods or services were provided in return for the contribution. This MUST be obtained before the tax appointment.
- ☐ IRA Year-end Statements
- ☐ Voided check for Direct Deposit or Withdrawal
- ☐ All statements showing income
- ☐ If you have a foreign bank account bring ending statement from the bank
- ☐ E mail address
- ☐ Mortgage interest statement Form 1098
- ☐ Child Care provider information (Name, address, SS# or EIN, amount paid)
- ☐ 1098-T if you have a college student in your household & amount paid
- ☐ Information on energy saving home improvements (ex. New furnace)
- ☐ Divorce and/or child custody papers – Signed 8332 if noncustodial parent claiming dependent