Note: Payment is due at the end of the appointment (check, Cash , Credit card or Paypal)

1. Date of Birth/ SSN for you and family
2. Previous year Federal and State Tax Return
3. Estimated taxes paid (if any)- date and amount paid
4. W-2 from all employers
5. Schedule K-1's (if any)
6. 1099-MISC Income (contractor/ self-employed)
7. 1099-K (if you generate income thru merchant Banks/institutions)
8. Interest Income Form 1099 –INT
9. Dividend Income – Form 1099-DIV
10. Foreign Account Information: Name, Address of the bank and highest amount held anytime during the year, Account number and Account holders name
11. Sale of ESPP/ RSU/ Options:
    a. **ESPP:** 1099-B from brokerage firm and **Statement of Taxable Income- Stock Purchase** from your employer
    b. **Stock options**: 1099-B and **Statement of Taxable Income** from your employer
    c. **RSU's** : 1099-B and **Statement of Taxable Income** . If RSU's were vested in prior years, please bring vesting price records which may be available in prior year tax records (look for a statement from your employer)
    d. Transaction details from your brokerage account used to sell the employer Stocks
12. Sale of Regular Trade- Form 1099B from your brokerage account & Purchase Price and Cost Basis (add Dividend Reinvested) of all stock sold in calendar year **(Please have this information ready when coming to do taxes)**
13. CAPITAL LOSS carried forward from prior years (can be found on prior year returns)
14. 1099-G in case of govt. distributions, FMLA, Unemployment Compensation, State Tax Refund
15. 1099-R IRA/ Pension Distribution (If the money is taken out of Roth Account, please specify this as this distribution may not be taxable)
16. 1099-C Cancellation of Debt (foreclosure/ bankruptcy)
17. 1099-A Abandonment of Debt (in the case of foreclosure)
18. 1099-S Sale of Residential Property

    a. If you have sold rental property, you may need to bring last few years tax returns as we need to verify the depreciation)
19. SSA-1099 Social Security Benefits
20. Jury duty pay records
21. Form – 1099MSA
22. Contributions to HSA/ IRA (Form 5498)
23. 1095-A Health Insurance Marketplace Statement (if you have Obamacare)
24. Any other 1099's or income statements
25. Alimony paid (require SSN of the recipient and amount paid)
26. Mortgage Interest / Line of Credit – Form 1098 (Interest paid up to $100K of HELOC)
27. Mortgage Interest on the second home (even if it outside the country)
28. Investment interest paid
29. PMI (mortgage insurance payment records)
30. Property tax payments made during the year (can be found on the county's website or your bank records or escrow statements)
31. Charitable Contribution Records (name of organizations for cash donations made)
32. Casualty and theft losses records (FMV of loss, insurance proceeds, description of items lost)

32. Medical/ Dental expenses (Premium, doctors' fee, medicines etc..)
33. Self Employed Health Insurance Deductions (Sch K-1 or Sch C)
34. Prior year State and Local Taxes Payment details
35. Personal Property Taxes (DMV license fee)
36. Child Care and Dependent Care Payment Details (EIN, SSN, Name, Address, Telephone, Amount)
37. Form – 1098 E -Tuition Fees Paid
38. **2008 First time home buyer credit repayment**: If you have received $7500 as FTHB credit, we need to include $500 repayment on your tax return
39. Other Misc. Itemized Deductions
40. Rental Property:
    a. Rental Income including Section- 8 payments on 1099-MISC
    b. Mortgage Interest, Property Tax
    c. Maintenance Fees
    d. Cost basis (building value plus capital improvements) to calculate depreciation
    e. All other expenses related to the property (utilities, repairs, cleaning and maintenance etc etc...)

41. S Corporation/ LLC/ Partnership Income (Schedule K)

    a. Sale of Property – Sale proceeds, Costs, Expenses
    b. Accounting records of your business

42. Sole Proprietorship (Schedule C)

    a. 1099's , other income
    b. Expenses
    c. Tax Payments
    d. P&L and Balance Sheet