



## Tax Appointment Checklist

If this is your first visit to AY Tax, please bring the following items to your appointment:

- Social Security Cards
- Last Year's Tax Return,
- Voided Check for Direct Deposit

### Income

- W-2 Form(s) from all employers and last pay stubs
- 1099's for Interests, Dividends, Rents, Retirement plan & pension plans distributions, social security, non-employee compensation, life insurance, annuities
- All investment account statements, CD's Annuities
- IRA's, Pension Plans, 401k plans, life insurance
- unemployment, state tax refunds, gambling winnings and losses, college savings plan distributions
- K-1 form estates, partnerships, trust, LLC's and S-Corps
- Escrow statement from sale, purchase, refinance of property and property exchanges
- Debt forgiveness, bankruptcy, foreclosure, \$ short sales. You may qualify to exclude these items as income. Please bring a list of your assets and liabilities. This is very crucial in determining if you have a taxable event.
- 1099 B from the sale of stocks, bonds or other investments. Please provide purchase date and cost basis
- Rental & Business income and expenses

### Deductions

- 1098 form(s) for mortgage interest paid and student loan interest paid.
- IRA and retirement plan contributions and College savings plan contributions.
- Alimony paid, SSN of the recipient, divorce decree.
- All Medical expense. Provide details of categories.
- Property taxes on houses, boats, RV's, Trailers and vehicles.
- Moving expenses if your move was for a job change of more than 50 miles.
- All charitable contributions. Must provide proper documentation (checks, letters, and mileage log book).
- Child care provider's name, address, phone number, the amount paid and tax ID.
- Education expenses, unreimbursed business expenses, job seeking expenses.

**We look forward to seeing you!**

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