

CHECKLIST: What should I bring?

- If you are a new client please bring in the last two years of your tax returns.
- Please bring all copies of your W-2's / 1099 Misc.
- Your bank will be sending you 1099 interest / 1099 dividends earned
- Remember unemployment compensation is taxed by the IRS
- Gambling winnings are taxable and the statement is called 1099G.
- Partnership K-1's will come late in March or early April, bring them.
- Charitable statement letters and list of all itemized donations.
- New home owners please bring the final closing statement or refinance statement of home or investment property.
- New clients: It's important you bring Social Security Cards for all your children and date of birth. Also, bring student loan contract and loan interest statement.
- Stock transactions - We need to know how much you paid for the stocks and the date you purchased it. we also need to know how much you sold it for and the date of sale. Ask your broker for buy and sell orders.
- Mortgage interest statement for interest paid and property statements and your DMV statement.
- Child care expenses - In order to qualify for the dependent care credit, you must have the name, address and EIN Number or Social Security number of the paid provider.
- If you cashed in your Mutual Funds or withdrew money from an IRA or rolled over an IRA or 401 Pension, please bring the statements. They are called 1099R.
- Self employed persons please bring in the profit and loss statement and your mileage book, medical exp., travel, education, dues, etc...
- If you have purchased a new business please bring your purchase agreement.
- Partnerships please bring your partnership agreement.
- Corporations please bring your by-laws, profit and loss statement and balance sheet.
- If you are thinking about filing any extension you must remember that you must pay the CASH YOU OWE UP FRONT. Filing the extension application will not extend the time to pay the tax due, only the time to file your tax return.
- Who will provide the voice mail service?
- Will a business phone line be used exclusively for business purposes?
- How will calls for the teleworker be handled at the office?
- Will his or her home-office number be given automatically?
- Will his or her calls be transferred? Forwarded? Or will coworkers take messages?
- How often will the teleworker check e-mail?
- Determine how important paper mail will be delivered on telework days.
- Would a daily status-update call with the telecommuter be appropriate