

## Previous Year's Tax Return

(NEW CLIENTS ONLY)

Federal

State

## Personal Data

Social Security Numbers (including spouse, children, and other dependents)

Address, telephone/cell phone numbers, email address

Provide signed Form 8332 for any dependents claimed pursuant to post '85 divorce decree, non-custodial parents ONLY

## Income

W-2 Forms

1099 Forms/Self Employment Income

Interest income statements: Form 1099-INT & 1099-OID

Interest from any Partnerships, Trusts, S-Corps, Estates & Tax Shelters

Dividend income statements: Form 1099-DIV

State and local income tax refund: Form 1099-G

Alimony received

Social Security Benefits received

Proceeds from broker transactions: Form 1099-B (Include cost basis if known)

IRA/Retirement Plan Distributions: Form 1099-R

Pensions and annuities: Form 1099-R

Rental Real Estate Income

K-1: Income from Partnerships, Trusts, S-Corps & Estates (Not needed if we prepare entity return)

Farm income

Unemployment Compensation: Form 1099-G

Gambling and lottery winnings

Income from jury duty

Legal awards/settlements

## Real Estate/Rental Data

Residential address(es)

Personal Property Tax information

Mortgage Interest: Form 1098

Sale of your home or other real estate: Form 1099-S

Second mortgage interest paid

Real estate taxes paid (all property)

Rent paid during previous year

1099-A: Abandonment of property

If new rental, bring HUD closing statement & tax bill

## Financial Assets

IRA Contributions made/planned Roth & Traditional

Traditional IRA basis

Value of IRAs on Dec. 31

## Deduction Documents

State & local income tax: your estimate tax voucher for the current tax year

State & local income tax paid during tax year

IRA, Keogh & other retirement contributions

Medical, Dental and Long Term Care expenses (not pre-tax)

Long Term Care Insurance Premiums

Substantial Casualty or theft losses

Personal property tax information (excise tax on vehicles)

Student Loan Interest

Education expenses

Charitable contributions

Unreimbursed employee expenses