

REMINDER CHECKLIST

- Last year's tax return (new client)
- Social Security numbers and dates of birth for all dependents
- W-2 form for wages
- 1099 forms for interest, dividends, retirement, social security, unemployment, and other income
- Year end statements from brokerage accounts
- Self-employment income and expense
- Rental income and expense
- K-1 forms from partnerships, corporations, and estates
- All other statements of income
- Purchase and sale information for anything sold during the year
- IRA year end statements
- Child care provider's name, address, social security number, and amount paid
- Medical Expenses
- Records of estimated taxes paid
- Records of property taxes paid
- DMV Registration fees paid
- 1098 forms for mortgage or student loan interest
- Donations of money to charity
- Donations of property to charity
- Volunteer and coaching expenses and mileage
- Amounts paid for higher education
- Job related expenses
- Investment related expenses

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