

# Lewis Business Services

Accounting & Tax

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## WHAT TO BRING TO YOUR TAX APPOINTMENT

- Bring the answers to this Questionnaire.
- Copy of Last Year's Tax Return (New Clients Only)
- Form W-2 Wage Statements
- Interest and Dividend Income - Forms 1099-INT & 1099-DIV, IRA Statements with Maintenance Fees
- Mortgage Interest Paid - Form 1098
- Real Estate Taxes Paid
- MVD Automobile Registration Paid
- Charitable Contributions - Cash & Non-cash
  - Check [sdgoodwill.org](http://sdgoodwill.org) to assist with valuing non-cash items
- Stock Sales - Form 1099-B
  - Original Cost of Stock
  - Date of Purchase
  - Sales Price
  - Date of Sale
- Pension/IRA Income - Form 1099-R
- Arizona Income Tax Refund - Form 1099-G
- Student Loan Interest Paid
- Alimony Paid or Received (Need SSN of Recipient)
- Lottery/ Gambling Winnings & Losses (only to offset winnings)
- Self-Employment Income & Expenses
- Rental Income & Expenses
- Form K-1's for Partnerships, LLC, Estates & Trusts
- Final Closing Escrow Statements for Sale or Refinance of Real Estate
- Social Security & Unemployment Income
- Medical & Dental Expenses Include mileage to & from doctors offices
- Child Day Care Expenses
  - Provider's Name
  - Provider's Address & Phone #
  - Provider's Federal Identification Number
  - Amount Paid per Child
- Education Costs for Any Family Member
- Employee Business Expenses (if exceeds 2% of your income)
- Amount Contributed to Your IRA
- Moving Expenses (if more than 50 miles from last job)
- Safe Deposit Box Rental
- List of Amounts & Dates Estimated Taxes Paid
- Any Correspondence from the IRS or Arizona Department of Revenue
- Copy of Most Recent Paycheck Stubs (if you want to change withholding)
- Bank Account Number & Routing Number to Direct Deposit Those Big Tax Refunds!
- Children's social security number's & birth dates
- Children's Education Expenses paid directly to the School
- Any other item \_\_\_\_\_