

Lewis Business Services

Accounting & Tax

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WHAT TO BRING TO YOUR TAX INTERVIEW

- Bring the answers to this Questionnaire.
 - Copy of Last Year's Tax Return (New Clients Only)
 - Form W-2 Wage Statements, 1099-s, K-1's etc
 - 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 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 (additional checklist available)
 - 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 (only if it exceeds 7% of income) 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 items _____
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