



A Federally Authorized Tax Practitioner  
Accounting & Tax

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## WHAT TO BRING TO YOUR TAX INTERVIEW

- Bring the answers to this Questionnaire.
  - Driver's License or photo identification
  - Social Security Card for children (New Clients or New Children Only)
  - 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 [www.goodwill.org](http://www.goodwill.org) to assist with valuing non-cash items
  - Include list of items donated, value at time of purchase, value at time of donation per [www.goodwill.org](http://www.goodwill.org)**
  - 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 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, if in college a account ledger from school to show amounts paid and 1099-T
  - 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
  - Settlement statement on purchase of house
  - Proof of Health Insurance, 1095 A, B or C if available or proof of Health Insurance Exemption
  - Any other items
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