

THINGS TO BRING LIST
BE SURE TO BRING THE FOLLOWING ITEMS WITH YOU:

- ___1. All 2016 copies of W-2's, 1099's and Schedule K-1 Forms.

- ___2. All 2016 year-end lender loan statements showing interest paid including those refinanced or paid-off during the year.

- ___3. 1099 Forms reporting all stock sales for 2016, as well as purchase date and cost information.

- ___4. All 2016 Form 1099 reporting unemployment compensation, state tax refunds, and social security benefits received.

- ___5. Social Security numbers of all dependents (if not previously supplied).

- ___6. 2015 Tax Returns (new clients only).

- ___7. Completed Itemized Deduction List.

- ___8. Quarterly Dates and Amounts of Estimated Taxes Payments if made for Tax Year 2016.

- ___9. Name, Address and Social Security Numbers of All Child Care Providers,
(If not supplied before).

- ___10. Any Self-Employment Income Received (i.e. babysitting, other side business) with expenses incurred. (Please provide on a separate sheet of paper).