
the library

bookkeeping & tax preparation

WHAT TO BRING WITH YOU TO YOUR TAX APPOINTMENT

INCOME STATEMENTS:

- W-2s
- 1099-Misc (for non-employee compensation, rents and royalties)
- 1099-Int (for interest paid to you)
- 1099-Div (for dividends you received)
- 1099-B (for proceeds of sale of stocks, bonds, securities)
- 1099-G (for unemployment, state tax refunds or other gov payments.)
- 1099-R (for income from retirement accounts)
- K-1
- Social Security income
- Alimony received

OTHER IMPORTANT FORMS:

- 1098 – Mortgage Interest Form
- 1098 – Student Loan Interest
- Property Tax Statements (remember the year is split – so we will want both the previous year and the current year statements to be certain we have the right info.

ALSO BRING:

- Letter of Engagement:** The IRS will not let any Tax Prep service work on your behalf without your written consent in the form of a Letter of Engagement. Print the letter and bring it in to speed up the process.
- Tax Interview – Main:** Even if we have worked with you before please fill this out in full and bring it with you. We want to have one on file for every tax year we prepare for you.
- Tax Interview – Business Expenses:** If you have a business or have deductible expenses as an employee please fill out this form and bring it with you. If you kept your expenses in another manner (Quicken, Quickbooks, Excel spreadsheet) that works too. There is no need to bring your receipts with you to your appointment, but you must have and retain receipts for the tax authorities.
- Tax Interview – Rental Property:** If you have a rental property, please fill this interview out and bring it with you as well.
- Previous Year's Tax Return:** If you are a new client please bring the previous year's tax return as it will help us make sure that we don't miss any carryover deductions.
 - **A NEW CLIENT, PLEASE ENCLOSE OR BRING LAST YEAR'S TAX RETURN.**