



Required Items for Income Tax Appointment

1. Copy of the last income tax return that was filed (2 years if possible). (New Clients only)
2. Closing Statement from all Real Estate Transactions during the year (Purchase, Sale, Refinance, Short Sale, or Foreclosure).
3. If you sold a property during the year please bring the Closing Statement from when the property was originally purchased (**no matter how many years prior**)
4. If you have sold any stocks please bring the purchase information too (Date and Amount Spent)
5. All Income Source Documents (W-2's, 1099's, Interest, Dividends, Stock Sales, Unemployment, Social Security, Retirement, etc.)
6. Remember to keep track of any IRA contributions for the year (Roth, Traditional, Non-Deductible, and SEP)
7. Totals or documents for all of the Standard Expenses.
 - a. DMV Fees
 - b. Charitable Donations – Cash and Checks
 - c. Charitable Donations – Goods to Organizations (Goodwill, Salvation Army, etc.)
 - d. Mortgage Interest
 - e. Property Taxes
 - f. Tax Preparation Fee.
 - g. Total of all Sales Taxes paid during the year.
8. Totals for all of the work related expenses that are job specific (Auto, Dues, Postage, Printing, Publications, Telephone, Union Dues, etc.).
9. If you own your own business please be sure to bring all income and expenses totaled.
10. If you have a rental property please be sure to bring all income and expenses totaled.
11. If you pay for childcare please be sure to bring the name, address, tax ID #, Phone Number, and the amount you paid for the year.
12. If you have paid for any college education for yourself or any person who you claim on your tax return please be sure to bring the total amount paid for each person.
13. If you have a new dependent please be sure to bring their birthday and Social Security Number.
14. If you have purchased a new vehicle please bring the contract for the purchase with you.
15. If you have paid estimated taxes please bring a complete list of what dates and amounts you paid to each government agency (IRS, State of California, etc.)