RPM & ASSOCIATES

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WHAT YOU NEED TO BRING TO YOUR TAX INTERVIEW

NEW CLIENTS ONLY		¨ Child Care Expenses/Documentation
		¨ DMV Fees Paid on Vehicles
¨ Last Three Years Tax Returns		¨ Interest Paid (Mortgage, Car, Etc.)
¨ Your/Dependent's SSNs		¨ Taxes Paid (Real Estate, Sales, etc.)
		¨ Medical & Dental Expenses
ALL CLIENTS (NEW & RETURNING)		¨ Work-Related Expenses/Mileage Log
		¨ Estimated State & Federal Payments
¨ All W'2, 1099s & 1098's		¨ Purchase or Sale of Residence Records
¨ Interest & Dividend Income		¨ Charitable Donations
¨ Pension & Retirement Income		
¨ Gambling Winning & Losses		
¨ Social Security/Unemployment Ins.		**FOR BUSINESS/RENTAL CLIENTS**
¨ Alimony Paid or Received		
¨ State Refunds or Amount Due		¨ Self-Employment Income & Expenses
¨ Stock Purchase & Sale Cost/Dates		¨ Income & Expense From Rentals
¨ Year-End IRA, 401K Statements		¨ Office-In-Home Information
¨ Education Expenses/Student Loan Int.		¨ Mileage Log