­

|  |  |  |
| --- | --- | --- |
| **NEW CLIENTS ONLY** |  | 🞎 Child Care Expenses/Documentation |
| 🞎 Last Three Years Tax Returns |  | 🞎 DMV Fees Paid on Vehicles |
| 🞎 Your/Spouse/Dependent’s SSNs |  | 🞎 Interest Paid (Mortgage, Car, Etc.) |
| 🞎 U.S. Tax ID Number for non-citizens who must file |  | 🞎 Taxes Paid (Real Estate, Sales, etc.) |
| 🞎 Birthdate Info. (You, Spouse, Dependents) |  | 🞎 Medical & Dental Expenses |
| 🞎  |  | 🞎 Work-Related Expenses/Mileage Log |
| **all CLIENTS (new & returning)** |  | 🞎 Estimated State & Federal Payments |
| 🞎 All W-2, 1099s & 1098s |  | 🞎 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 |  | 🞎 Self-Employment Income & Expenses |
| 🞎 State/Local Refunds or Amount Due |  | 🞎 Income & Expense From Rentals |
| 🞎 Stock Purchase & Sale Cost/Dates |  | 🞎 Office-In-Home Information |
| 🞎 Year-End IRA, 401K Statements |  | 🞎 Mileage Log/Vehicle Information |
| 🞎 Education Expenses/Student Loan Interest |  | 🞎 |
| 🞎 Legal Documents, divorce, adoption, custody |  | 🞎 |
| 🞎 Moving Expenses  |  | 🞎 |
| 🞎 |  | 🞎 |