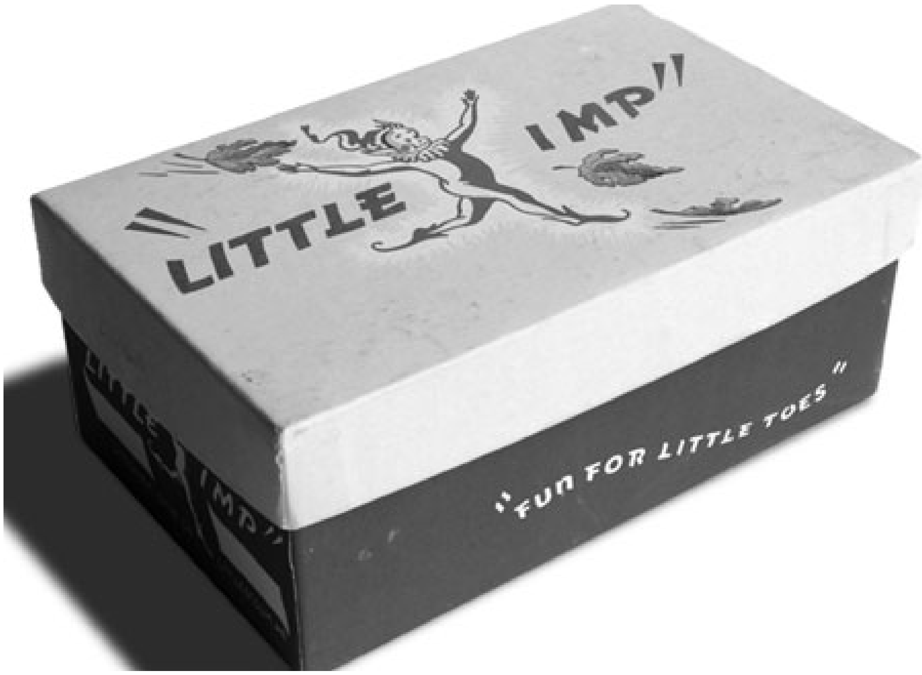
Tax Client Checklist “What do I bring?”



The Basics

Prior Year

- A copy of last year’s federal and state tax returns, if you’re a new client

Earnings

- W-2 statements of employment earnings
- 1099-MISC statements of freelance earnings
- Self-employment summary of **all** your earnings, whether on a 1099 or not

Investments

- Investment statements (1099’s) reporting capital gain/loss, interest, dividends
- Gain or loss for investment accounts privately traded

Other Income

- “K-1” statements of “pass-through” profit and loss
- Summary of rental income
- 1099-R for retirement plan distributions
- SSA-1099 for Social Security earnings

Tax Payments

- Dates and amounts of any estimated taxes paid

Itemized Deductions

- 1098 forms you receive from your mortgage company
- Real estate taxes paid directly to your city or town during the year
- Auto excise taxes paid during the year
- Summary of charitable donations, including non-cash donations (like Salvation Army)

Education Deductions

- 1098-T for tuition
- Student loan interest statement
- RI residents: Amount of contributions to State 529 college savings plan

Rental Deductions

- 1098 mortgage forms
- Other expenses summarized by category

Self Employed Deductions

- Business mileage and ending odometer reading
- Other business expenses by category
- Health insurance paid for employees

Other Deductions

- Energy efficiency improvements to your personal residence
- Health insurance paid personally
- Daycare and summer camp expense for children who were under age 13
- Non-reimbursed employee expenses, including business mileage and ending odometer reading if you use your vehicle for your employer and don't get reimbursed

Miscellaneous

- Birthdates and socials of all family members
- Traditional IRA contributions made for 2013
- Health Savings Account contributions made for 2013
- RI residents: Contact information for your landlord if your household income was less than $30,000
- Mass residents: 1099-HC for health insurance

This list is an outline and not a comprehensive list. Bring any questions and additional documents to your tax appointment.