

Tax Meeting

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Tax Return Items

Please bring:

- Last 3 years of tax returns (these years can be amended), birthdates for all individuals in your household or dependents.
- Drivers License for taxpayer and spouse (new requirement for identity theft protection)
- Bank account information for tax refund deposit.
- Original Form (s) W-2, 1099-Misc or 1099-R
- Brokerage Statements, 1099Int and 1099Div
- Schedule A Itemized Deductions including Mortgage, Charity, Work Expenses, Medical, Taxes paid including Personal Property Tax on Auto, Real Estate.
- All other information notices you received, or any items you have questions about.

Other Information

In our meeting, we'll discuss your individual tax situation. The list presented here is a basic list for all taxpayers. Additional items are needed for Business and Rental Property Owners. I'll provide assistance at our tax meeting to help you gather any information that you do not provide during our tax meeting. Don't hesitate to contact my office with questions or information.