

## Required Documents List

1. Signed Engagement Letter.
2. Client Organizer – via paper or internet.
3. If new client, copy of last two year's tax returns..
4. E-mail addresses.
5. Documents related to income such as all W-2's, 1099's, Social Security statements Unemployment Compensation. For purpose of calculating your sales tax deduction, I need a total of all income, including non-taxable income.
6. Sales tax paid on large purchases.
7. All Form 1099-B's related to interest, dividend, and capital gain income. Please provide detailed information about foreign bank accounts if you have one.
8. All Form 1099-MISC's and all other information related to Self-Employment Income.
9. All receipts for assets purchased for business.
10. If claiming business automobile expenses, I need the following for each vehicle:
  1. The year, make, and model of the vehicle.
  2. The total mileage put on the vehicle for the year.
  3. Mileage log.
11. Any broker statements, sales of stocks or bonds plus the basis of the items bought and purchase date. I must have complete information on the purchase of all assets sold, such as date of purchase and cost.
12. Closing statements for sales and/or purchases of property – whether for business, residential, or rental.
13. All Schedule K-1's plus any attachments.
14. All documents related to income and expenses for Farm and Ranch.
15. Self employed health insurance premiums and method of payment.
16. Child caregiver's name, address, EIN or Social Security number, and total childcare payments made per child. I need this information even if your child care was paid through your flex plan.
17. Household employee's information, such as copy of W-2 and state unemployment tax reports.
18. IRA Annual Statements for all IRA's, Roth's, Sep-IRA's, annual Social Security Benefits statement..
19. Information on property inherited.
20. Will, Directive to Physician, Durable POA, Medical POA.