

DID YOU FORGET?

- Car Taxes and Real Estate Taxes.
- Charitable Donations – MUST HAVE PROOF – either a check or a dated receipt from the organization.
- New Dependant's Full Name, Social Security #, and Date of Birth.
- Closing Documents for Sales of Real Estate and Business Interests, and Original Purchase Documents.
- Date Purchased, and Cost Basis (your original cost) of Investments sold during the Income Tax Year.
- Social Security Benefits (Form # SSA-1099).
- Mortgage Interest Information.
- Gambling Income and Expense Information (Win/Loss Statement).
- Did your filing status change during the year? For instance, did you marry, divorce, or become widowed?
- Are children filing their own taxes and claiming their personal exemption?
- Unreimbursed employee auto mileage information or total and business mileage for Schedule C.
- Forms K-1 from Partnership, "S" Corp Interests.
- Do you qualify for any of the energy tax credits? For example, purchase of solar panels, hybrid or alternative fuel cars, insulation, energy-efficient windows, etc.

We cannot process your return without these items, if they apply to you!