TAX APPOINTMENT CHECKLIST

SR FINANCIAL SERVICES

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My Tax Appointment is schedule for ________________________________ at _____________am/pm

INCOME STATEMENTS

- ✓ W-2s *(employee wages)*
- ✓ 1099-INT *(interest income)*
- ✓ 1099-DIV *(dividends)*
- ✓ 1099-MISC *(non-employee compensation, rents & royalties)*
- ✓ 1099-B *(proceeds of sale of stocks, bonds, securities)*
- ✓ 1099-R *(retirement distributions)*
- ✓ 1099-G *(unemployment, state tax refunds or other government payments)*
- ✓ Alimony received
- ✓ K-1 *(S Corps, partnerships, trusts)*
- ✓ SSA 1099 *(Social Security Income)*
- ✓ 1099-C *(Cancellation of Debt)*

ADDITIONAL FORMS

- ✓ 1098 (Paid Mortgage Interest)
- ✓ Property Tax/Escrow Statements
- ✓ 1098-E *(Paid Student Loan Interest)*
- ✓ 1098-T *(Tuition Paid)*
- ✓ 1095A/B/C *(Healthcare Coverage)*

OTHER IMPORTANT ITEMS (can be found at our website www.srfinancialservices.com)

- ✓ **Signed Letter of Engagement** (Explains our services and process)

- ✓ **Tax Interview: General information and life changes (**Even if we have worked with you before please fill this out in full and bring it with you)

- ✓ **Self-Employed Interview:** If you are self-employed, please fill out this form and bring it with you. Please email a file if you have organized your expenses with Excel, Quicken, Quickbooks, Mint, etc. There is no need to bring your receipts with you to your appointment, but you must have and retain receipts for the tax authorities.

- ✓ **Rental Property Interview**: If you have a rental property, please fill this interview out and bring it with you as well.

- ✓ **Previous Year's Tax Return**: If you are a new client please bring the previous year's tax return as it will help us make sure that we don't miss any carryover deductions.