Advisor Tax Services
253-5222

Items to bring to your appointment:

- ✓ **Copy of last 3 years of tax returns if a new client**
- ✓ **Annual Advisor Tax Services questionnaire**
- ✓ **Social Security numbers and birthdays for yourself, spouse & dependents**
- ✓ **W2 and 1099-MISC forms showing employment income**
- ✓ **1099G forms for unemployment and state tax refunds**
- ✓ **1099 forms for income from interest, dividends, sale of property, social security, HSA, pension, IRA and other retirement plan benefits**
- ✓ **K1 forms for income from partnership, S-Corp, estates or trusts**
- ✓ **Child care provider information including amount paid, name, address and employer identification number or social security number of provider**
- ✓ **Current year property tax bill if homeowner (this can be obtained from your town clerk)**
- ✓ **Mortgage interest forms 1098; if you bought or sold a home, bring copies of all closing (HUD-1) statements which list all closing costs**
- ✓ **Student loan interest and tuition forms 1098-E and 1098-T.**
- ✓ **Copy of calendar year account transaction statements (charges and payments) from college for yourself, spouse or dependents**
- ✓ **IRA contribution information form 5498**
- ✓ **If self-employed, a list of income and expenses by category. Ask for our business income/expense organizer.**
- ✓ **If you own rental property, a list of rent received and rental expenses. Ask for our rental income/expense organizer.**
- ✓ **If you itemize deductions, a list of taxes paid, contributions, medical expenses, un-reimbursed employee business expenses. This is a short list. There are other potential deductions.**

This is a basic list. Please call if you if you have more complex questions.