

Items to bring for preparation of your Tax Returns

Previous Year's Tax Return (New Client Only)
Federal
State

Personal Data
SS Cards (include spouse & dependents)
Address, phone #, email address
Date of birth (Birth cert. for minor)
Valid Picture ID (Bank Products Only)

General Income Items
W2 Forms
Interest Income (Form 1099-INT)
Dividend Income (Form 1099-DIV)
Income from S-Corp, LLC or Partnership (K-1)
Retire Income (Form 1099-R)
Social Security Income (Form SSA)
Alimony Received
Gambling Win
Cancellation of Debts
Other Income

Rental Property
Rents Received
Mortgage Interest
Real Estate Taxes
Insurance
Auto & Travel Expenses
Cleaning & Maintenance
Repairs
Supplies
HOA or Condo Fees
Commissions
Management Fees
Legal & Professional
Utilities

1099 Contractor or Business
Business Income (Form 1099-MISC)
Advertising
Car Miles (or actual expenses)
Cleaning & Maintenance
Commissions
Insurance
Legal & Professional
Repairs
Supplies
Taxes & Licenses
Telephone
Internet Services
Office Expenses
Home Office Expenses
Other Expenses

Stock Sales
Name of Stock
Buy Date
Sell Date
Sell Amount
Buy Amount

Mutual Fund Sales
Name of Mutual Fund
Sell Date
Sell Amount
Average Cost Basis

Special Deductions
Moving Expenses
Tuition
Student Loan Interest
Alimony Paid
S/E Health Insurance
Teacher Expenses
Health Savings Account

Itemized Deductions
Mortgage Interest
Real Estate Taxes
PMI Insurance
State Taxes
DMV Registration
Contributions - Cash
Medical Expenses

Employee Business Expenses
Car Miles (or actual expenses)
Travel
Meals & Entertainment
Supplies
Telephone
Internet
Dry Cleaning
Computer
Other Expenses

Child Care Credit
Amount paid for each child
Name of Child Care Provider
Address of Child Care Provider
Federal ID # of Provider

Tax Credits
Tuition Expenses
Resident Home Energy Improvements
Hybrid Car Purchase

Other
Adoption Expenses
Investment Interest & Expenses
Tax Preparation Fees
Job Hunting
Safe Deposit Box
Sale of Real Estate
In-Home Nanny (Wages Paid)
Health Insurance
Flexible Spending
Long-Term Care Insurance
Any other relevant information

PLEASE LET ME KNOW IF YOUR ADDRESS HAS CHANGED.

Also bring in any other documents marked "Important Tax Information" on the envelope. In addition, please bring in any other information that you feel may be relevant to the preparation of your tax returns.

\$MART TAX & ACCOUNTING SERVICES

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CLIENT'S COPY INCOME TAX 2013

I.R.S. Refund Telephone: **1 (800) 829-1040**

Online: IRS.gov, and click on "Where's my refund?"

CA State Refund Telephone: **1 (800) 852-5711**

Online: FTB.gov, and click on "Refund Status"

Your Federal Refund: \$

Your State Refund: \$

Please keep your tax return file in a safe place

We prepared your returns based on the information you provided us.

Please review the return carefully to ensure that there are no omissions or misstatement of material facts

Keep all receipts and supporting documents for at least 3 years after the date that the tax becomes due or is paid, whichever is later.

If you receive any notices concerning your tax or have any questions, PLEASE contact us. We will be happy to assist your needs

THANK YOU FOR YOUR BUSINESS

Sign In Form

Date: _____

Print Name	Phone #
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