

# *Pamela Price EA Inc.*

*Pamela Price EA & Bill Frischman EA*

*Enrolled to practice before the Internal Revenue Service*

## **Checklist of Things to Bring to Your Interview**

**In addition to your completely, filled out Worksheet:**

- All copies (please DO NOT separate) of **W-2s, Form 1099s (all types) & K-1 Forms.**
- 2014 escrow statements** (Includes purchases, sales, and refinances of homes & rentals)
- Property tax bills** for homes, investment, or rental properties.
- All documentation related to sales of stocks** (1099 Forms and either Statement of Realized Gains & Losses, buy slips, or your own accounting of purchases cost & dates)
- 1095 Forms for the Affordable Care Act information for health insurance.**
- 1099 Forms for unemployment compensation, state tax refunds, and social security benefits received.**
- 1099 Forms for IRA and other retirement accounts.**
- 1099 Forms for nonemployee compensation or rents.**
- 1098 Forms** (year end statements) **on homes, rental properties, vacation homes, and time shares.** (This includes statements for loans which were refinanced or paid off during the year. When your lender changes during the year, there will usually be two forms.)
- Record of **federal and state Estimated Tax Payments.** Your worksheet has a place to make these entries on page 2 of *Itemized Deductions*. (**Remember:** The 4<sup>th</sup> estimate was due 1/15/2016 so you may have to look in this year's records for that figure. It still counts as this year.)
- Information for **child care credit.** (This would include names, addresses, social security numbers or employer's ID number, and separate totals for each babysitter, preschool, or other providers)
- Social security numbers for ALL dependents** (if not previously provided). You cannot file with a missing number.
- Copy of 2014 tax returns (NEW CLIENTS ONLY).**
- Any **IRS or FTB correspondence** received during the year.