

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 (hopefully) 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)
- ❑ **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 4th estimate was due 1/15/2017 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 – sometimes called a 95 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 2015 tax returns (NEW CLIENTS ONLY).**
- ❑ Any **IRS or FTB correspondence** received during the year.