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) ***filled out Worksheet:***

- ❑ 1. All copies (please don't separate) of **W-2s, Form 1099s** (all types) **& K-1 Forms.**
- ❑ 2. **2014 escrow statements** (Includes purchases, sales, and refinances of homes & rentals)
- ❑ 3. **Property tax bills** for homes, investment, or rental properties.
- ❑ 4. **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)
- ❑ 5. **1099 Forms for unemployment compensation, state tax refunds, and social security benefits received.**
- ❑ 6. **1099 Forms for IRA and other retirement accounts.**
- ❑ 7. **1099 Forms for nonemployee compensation or rents.**
- ❑ 8. **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.)
- ❑ 9. 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 1/15/2014 so you may have to look in this year's records for that figure. It still counts as this year.)
- ❑ 10. 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)
- ❑ 11. **Social security numbers** for **ALL** dependents (if not previously provided). You cannot file with a missing number.
- ❑ 12. **Copy of 2013 tax returns** (**NEW CLIENTS ONLY**).
- ❑ 13. Any **IRS** or **FTB correspondence** received during the year.