

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 worksheets:

- All copies (please DO NOT separate) of **W-2s, Form 1099-Rs, 1099s** (all types) & **K-1 Forms**.
- 2017 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** (sometimes called 1099G).
- 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 “Basic” worksheet has a place to make these entries on page 2 of *Itemized Deductions*. (**Remember:** The 4th estimate was due 1/15/2018 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 2016 tax returns (NEW CLIENTS ONLY).**
- Any **IRS or FTB correspondence** received during the year.
- Form 1095-A** which you will have if your health coverage was through a marketplace, such as **Covered California**. If so, we must have this form before we can file your return.