## **FINAL CHECK LIST**

	Spouse's Signature	
	Spouse's Signature	Date
	Spouse's Signature	Date
	Taxpayer's Signature	Date
	To the best of my knowledge, all information cont	ained within this document is true, correct and complete.
**Ľ	Denotes IRS matching program. IRS is able to match these numbers; if t	hey do not match amounts on your return, it may trigger a service center audit.
	Prior Year's Return If our firm did not prepare your return for the	prior year, please provide a complete copy of that year's return.
	<b>State Use Tax</b> If you purchased something out-of-state or over th sales tax can be included with your tax return or by other means.	e Internet and did not pay state tax, please provide a list of items and cost so that
	Household Employees 🗸 Check if you employ household work	ers.
	<b>Questions</b> please list any questions you may have, your telephone questions that arise while your return is being completed.	e numbers (work and home), and the best time to reach you in regard to possible
	Partnership and Trust K-1s provide all K-1s and instructions.	
	Property Sales** if you bought or sold property, including your ho	me, please call for additional instructions.
	<b>Home Mortgage Interest**</b> use the amount from the Form 1098 provided by the lending institution(s). If you refinanced during the year, please provide the single document (e.g., escrow or other closing statement) that details all costs of the transaction.	
	Stock Sales for each stock transaction, include the following: gross purchase cost (or inherited basis), date of acquisition, sales price** (net amount received), and date of sale.	
	☐ IRA Distributions or Rollovers all IRA distributions <sup>**</sup> (not direct transfers) MUST be reported on your tax return EVEN if they were rolled over. Provide a copy of the 1099R for IRA distributions. If the distribution was rolled over into another IRA account, indicate how much of the distribution was rolled over, and the dates you received the distribution and completed the rollover. When funds are simply <u>transferred</u> between IRA accounts by the banks or investment institutions holding your funds, no special reporting is required.	
	<b>1099s**</b> For Interest & Dividends you generally need only list the payers and amounts; segregate according to interest and dividends. Many payers, such as brokerage firms, use substitute 1099s that may be difficult to understand. If you have concerns about interpreting a substitute 1099, please provide it. Please provide copies of statements from mutual funds and tax-free investments because these may receive specialized tax treatment.	
	<b>1099R Forms**</b> these are issued for various types of pension inco	me and IRA account distributions. Provide one copy for each distribution.
	W-2 Forms** please retain Copy "C" for your records. Provide all	other copies.
	numbers. Social Security numbers** are generally MANDATORY for a the dependent's earnings for the year and whether or not the child w	e changes in dependent status. List new dependents and their Social Security all dependents. If a dependent is age 19 or over and is working, please indicate vas a full time student for at least four months and one day during the year. heir own tax return. To avoid problems and government audit, you may wish to

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