

WHAT TO BRING TO YOUR TAX INTERVIEW

NEW CLIENTS ONLY		<input type="checkbox"/> Child Care Expenses/Documentation
<input type="checkbox"/> Last ^y Years Tax Returns		<input type="checkbox"/> DMV Fees Paid on Vehicles
<input type="checkbox"/> Your/Spouse/Dependent's SSNs		<input type="checkbox"/> Interest Paid (Mortgage, Car, Etc.)
<input type="checkbox"/> U.S. Tax ID Number for non-citizens who must file		<input type="checkbox"/> Taxes Paid (Real Estate, Sales, etc.)
<input type="checkbox"/> Birthdate Info. (You, Spouse, Dependents)		<input type="checkbox"/> Medical & Dental Expenses
<input type="checkbox"/>		<input type="checkbox"/> Work-Related Expenses/Mileage Log
ALL CLIENTS (NEW & RETURNING)		<input type="checkbox"/> Estimated State & Federal Payments
<input type="checkbox"/> All W-2, 1099s & 1098s		<input type="checkbox"/> Purchase or Sale of Residence Records
<input type="checkbox"/> Interest & Dividend Income		<input type="checkbox"/> Charitable Donations
<input type="checkbox"/> Pension & Retirement Income		<input type="checkbox"/>
<input type="checkbox"/> Gambling Winning & Losses		<input type="checkbox"/>
<input type="checkbox"/> Social Security/Unemployment Ins.		FOR BUSINESS/RENTAL CLIENTS
<input type="checkbox"/> Alimony Paid or Received		<input type="checkbox"/> Self-Employment Income & Expenses
<input type="checkbox"/> State/Local Refunds or Amount Due		<input type="checkbox"/> Income & Expense From Rentals
<input type="checkbox"/> Stock Purchase & Sale Cost/Dates		<input type="checkbox"/> Office-In-Home Information
<input type="checkbox"/> Year-End IRA, 401K Statements		<input type="checkbox"/> Mileage Log/Vehicle Information
<input type="checkbox"/> Education Expenses/Student Loan Interest		<input type="checkbox"/>
<input type="checkbox"/> Legal Documents, divorce, adoption, custody		<input type="checkbox"/>
<input type="checkbox"/> Moving Expenses		<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>



454 Washington Street, Suite 1, Norwell, MA 02061
 E: info@safeharbartaxandpayroll.com
 P: 339-214-2108 • F: 781-987-1526
safeharbartaxandpayroll.com