

- ☐ Copies of your 2017 Federal and State income tax returns (new clients only)
- ☐ Name, date of birth, and copy of social security card of taxpayer, spouse and any dependants
- ☐ The amount of alimony paid or received
- ☐ The amount of child care expenses and provider information
- ☐ Form(s) W2 for wages earned
- ☐ Form(s) W2G showing the amount of any gambling winnings received and offsetting losses
- ☐ Form(s) 1099-INT for interest earned
- ☐ Form(s) 1099-DIV for dividends earned
- ☐ Form(s) 1099-SSA for the amount of Social Security income received
- ☐ Form(s) 1099-B showing proceeds from sale of stock with original cost and purchase date
- ☐ Form(s) 1099-G showing the amount of unemployment compensation received
- ☐ Form(s) 1099-R for IRA or pensions distributions
- ☐ Form(s) 1099-MISC or records of any self employment income and offsetting expenses.
- ☐ Any rental income and offsetting expenses
- ☐ The amount of last year's NJ Homestead rebate and/or PTR (Property Tax Reimbursement)
- ☐ The amount of and standard or Roth IRA contributions made
- ☐ Form(s) 1098-T for the amount of tuition paid for post secondary education
- ☐ Form(s) 1098-E showing the amount of student loan interest paid for you, spouse, & dependants
- ☐ The amount of medical and dental expenses
- ☐ The amount of property taxes paid
- ☐ The amount of mortgage/home equity interest paid
- ☐ The amount of charitable donations (cash & non cash)
- ☐ The amount of un-reimbursed employee business expenses
- ☐ The amount of sales tax paid on the purchase of an automobile or any other significant purchase
- ☐ The records (settlement statement) of any home sale, purchase, or refinance.
- ☐ Copy of blank or cancelled check (if you would like your refund directly deposited)