

ABBREVIATED LIST OF REQUIRED TAX INFORMATION

- Original W-2 Wage Statements
- Listing of all Federal and State estimated tax payments and date paid
- Copies of all Form 1099's
- Social Security Form 1099S, if applicable
- All Form 1099-B for Stock, Bond, and Mutual Fund transactions and original cost (basis) information along with purchase dates
- All information on Tax Exempt Income from any and all sources
- All alimony paid or received and to whom or from whom with social security numbers
- All self employment income and detailed expenses
- All closing statements and related papers for all real estate purchases and sales. If you sold a residence, please include original purchase price and date along with a list of improvements and costs.
- All information pertaining to refinancing your home mortgage that include "points paid"
- All Federal and State Partnership, LLC and "S" Corporation K-1's with all supporting documents
- All income and detailed expenses for each rental property including costs of new properties with allocation of purchase price to land and building(s)
- All information pertaining to Pension Plan, Retirement Savings Plan, 401k Plan and IRA distributions including Lump Sum and Roll Over Information
- All medical and dental expenses, medical & long term care insurance premiums
- All State and Local income taxes and real estate taxes paid on all properties owned
- All Mortgage and Home Equity Loan interest payments and all investment interest paid
- All cash contribution-documented if over \$250 and non-cash contributions all documented
- All Casualty Losses in excess of 10% of your gross income
- All possible un-reimbursed Employee or other business expenses related to taxable income