

## **Employees with W2's**

- Personal Property Tax Receipt
- Real Estate Tax Receipt (if you own a home, and/or rental property)
- Medical Miles or Receipts (if you are curious whether or not you qualify for a medical deduction, take your gross income and multiply it by 7.5%)
- Receipts on the Purchase or Sale of Stocks
- Receipts or paper work on the Roll Over or Cash Out on IRA's
- Form 1098 for Interest Income
- Receipts on Charitable Donations
- If you Sold or Purchased Real Estate, we will need your closing papers.
- If you went through a divorce, we need a copy of the divorce decree especially if there are children involved who will be claimed on the tax return.
- If you got Married, we need the new info.
- If you had Children, we need their Names, Dates of Birth and Social Security Numbers.

## **Self Employed Individuals**

Feel free to download the Excel Spreadsheet for Monthly Bookkeeping from [www.trbcpa.com](http://www.trbcpa.com)

- Everything listed for Employees with W2's plus the following:
- All Issued 1099's
- Business Expenses
- Health Insurance/Long Term Care Insurance Receipts
- Mileage Logs

## **Businesses / Corporations**

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- Profit & Loss Statement
- If you use Quick Books, bring in a Quick Books Backup File