

Checklist of Items to Enclose

- Real Estate Sale or Purchase / Closing Statements
- W-2's
- 1099's - Interest and Dividend
- Broker Statements, Sale and Purchase of Stocks
- 1098's - Statements of Mortgage Interest
- 1099R's - Annuities and Pensions
- K-1's - Partnerships, Investments and Subchapter-S Returns
- 1099's - Social Security Benefits
- 1099's - Unemployment Benefits
- 1099's - State Tax Refund
- Miscellaneous 1099's Received
- Copies of Real Estate Tax Bills
- Voided Check for Direct Deposit of Refund
- Documentation for Charitable Contributions