



Y&G ACCOUNTING SERVICES INC.

5370 PALM AVE SUITE 9 HIALEAH FL 33012



Pre-Appointment Checklist

Please read the entire list and make sure that you bring **EVERYTHING THAT APPLIES** to your situation.

- Completed Client Information Sheet *THIS IS A REQUIREMENT FOR YOUR RETURN TO BE COMPLETED*
- Please bring Driver license(s) and Social Security cards for Taxpayer, and/or Spouse, Dependent(s) if listed on your Client Information Sheet
- A Copy of Last Year's Tax Return (New clients only)
- Forms W-2 for Taxpayer and/or Spouse
- Forms 1099-INT Bank Interest and Forms 1099-DIV Stock Dividend Statements
- Forms 1099-MISC for Sole Proprietorships (Small Business) along with a List of Expenses
- Forms 1099-R for Pensions, Annuities and IRAs
- Social Security Annual Statements
- Forms 1099-G for Unemployment Compensation
- Forms 1099-G for Gambling Winnings
- IRA Contribution or Roth IRA Contribution Forms
- Tuition Statements and amount paid for course related expenses (such as books and student activity fees)
- Student Loan Interest Statements
- Income from Real Estate Rental and a List of Expenses
- Forms K-1 for S Corporations and Partnerships
- Forms 1099-B Gross Sales Proceeds and Purchases Year-End Transaction Brokerage Statements (You need to provide us with the purchase price of the stock if statement does not include it)
- Mortgage Interest and Real Estate Tax Statements (If it is a New Mortgage We Need the Closing Statement)
- Charitable Contributions (If you have a contribution over \$ 500.00, must have receipts. They need to be attached to the Federal Tax Return)
- List of Non- Reimbursed Employee Business Expenses
- For Child Dependent Care, we require Name, Address, FEIN or Social Security Number and AMOUNT PAID FOR THE YEAR AND FOR WHICH CHILD.

The above checklist notes more common tax items and is not intended to be exhaustive. During your meeting we may ask for additional information and may inform you of additional deductions and tax credits you may be entitled to.