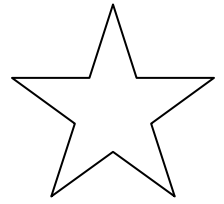


Standard Tax Documents:



W-2s, 1099s, K-1's (all income/misc tax forms)
Last 3 years of 1040 returns (new clients only)
Social Security cards/DOB on new dependents
Social Security Statement of Earnings History
Date/Amount of each quarterly 1040-ES and State
IRA/Roth/SEP Contributions and/or Distributions
Income/Expenses for Business (Self-Employed)
Income/Expenses for Real Estate or other property
Auto Business miles, odometer and interest paid
Registration and/or invoice on any new vehicle
Lottery/Gambling Winnings/Losses
Alimony paid or received
HUD statements on Sale/Purchase/Refinance
Name, address & ID# of all child care providers
Any IRS or State correspondence received
Homeowner's Insurance Declaration Page(s)
Property Taxes paid (itemizers and non-itemizers)
Energy Efficient home improvements for Tax Credit
Elementary & Secondary School Tuition/Expenses
Bank accounts/Investments in a Foreign Country
Stock and/or Mutual Fund Sales or Purchases
Student Loan Interest paid
Sales Tax paid on "Big Ticket" items
Household Employee information
All health insurance premiums paid

Info on any Debts cancelled or forgiven
Post-Secondary Tuition, Fees & Course Material
Retirement Plan transfers or rollovers
Information on Casualty/Theft Losses
Economic Recovery payments received
COBRA continuation health Coverage
Medical/Dental Expenses (out-of-pocket)
Auto Mileage on all Medical Expenses
Charitable Contributions
Non-Cash Charitable Contributions
Prizes, Bonuses, Awards
Scholarship or Grants received
Unemployment Compensation
Job Search Expenses
Employment Related Expenses
Investment Related Expenses
Job-Related Moving Expenses
HSA/MSA Contributions/Distributions
Bank, Acct # and Routing Transit #
Education contributions/distributions (529)
LLC and/or Tax ID# set-up Forms/Documents
Info on any Bartering Transactions

***Inform us of any significant changes in your life:
New address, large gifts received, job changes,
marriage, adoption, divorce, death, inheritance,
new child, health changes, bankruptcy, etc.....**