Tax Checklist For New Clients

What to bring to your first appointment – check off the items and include them in the package you give to Jerry. As always if you have any questions, please call 503-646-8225 or email Jerry@leveycpa.com.

	Done
Copy of your 2008 Returns (Federal and State) – if you got married in 2009, we need both your returns.	
A voided check for direct deposit of refunds or debit memo if you owe. It can be for a savings or checking account. We need the routing number and account number so do not bring a deposit slip.	
2008 & 2009W-2(s) – we need these form(s) for data input	
Birth date and Social Security Number for you, your spouse and children	
Contact information – Phone number, cell phone, email, address where you want your information sent to (are you moving soon?)	
2008 & 2009 – 1099's for any interest earnings and stock brokerage accounts. 2008 & 2009 1098's for home mortgage interest, property taxes, etc.	
Charitable contributions – talk to Jerry on details.	
Medical expenses you had to pay on your own – break it out into categories for doctor, dentist, prescriptions, insurance, etc.	
Business expenses – car mileage related to work, meals and hotels, uniform, equipment, supplies etc. Separate out each line item.	
HUD (Housing and Urban Development) Form if you bought, sold or refinanced a house(s). This is a form that is included in your closing papers and is usually 8 ½ x 14 size.	
Information regarding rental houses – income, expenses, etc.	
Write out all line items separately and as legible as possible (please type it out if you can) We do not need your receipts, just totals, unless specified in this list. If an item is in question (is this tax deductible?) include that item in your list and let Jerry decide if it is relevant. More information is better and when in doubt include it! Look at last year's tax return as a reference and to make sure you have included everything.	