

MOSS & RIGGS, PLLC

Items Needed for Preparation of Your Individual Tax Return

1. Completed New Client information form
2. If not prepared by Moss & Riggs, PLLC, your prior three years of tax returns
3. All Forms W-2 for wages, salary and tips
4. All Forms 1099 for interest, dividends, retirement, miscellaneous income, Social Security, state or local refunds, stock sales, gambling winnings, etc.
5. Brokerage statements showing investment transactions for stocks, bonds, etc.
6. Basis information for the sale of any stock
7. Schedules K-1 from partnerships, S corporations, estates and trusts
8. Statements supporting deductions for mortgage interest, taxes and charitable contributions (including any Form 1098-C) and documentation required for charitable contributions
9. Copies of closing statements (Form HUD-1) regarding the sale or purchase of real property.
10. Legal papers for adoption, divorce, or separation involving custody of your dependent children.
11. Any tax notices sent to you by the IRS or other taxing authority
12. Vehicle questionnaire for business use of vehicles
13. A copy of your mileage log(s) for business use of vehicles