ERBFINANCIAL

WE MAKE FILING LESS TAXING

☑ Tax Preparation Checklist

(what you should bring in or send us)

- ☐ 1. Copy of your Driver's license or State ID, both sides (unless we already have your current, valid ID on file. Joint filers need both IDs.)
- ☐ 2. Wage Statements (W-2)
- ☐ 3. Pension, IRA, or Annuity Statements (1099-R)
- ☐ 4. Social Security Income Statements (SSA-1099)
- ☐ 5. Interest & Dividend Income Statements (1099-INT & 1099-DIV)
- ☐ 6. Unemployment Income Statements. In NY State, Form 1099-G will not be mailed to you. You will need to obtain it online at https://www.tax.ny.gov/pit/file/1099g.htm
- ☐ 7. Consolidated tax statements of investment income, sales, and purchases.
- ☐ 8. Any other 1099 Forms
- ☐ 9. Education Expense Information (1098-T, and detail of expenses paid in—Call us.)
- ☐ 10. Dependent Care expenses: Amount paid for each child; Providers Name, address, Federal ID number, and amount paid to each provider
- ☐ 11. Record(s) of Estimated Tax Payments made (Federal and State), including dates paid
- ☐ 12. If you Itemize: Property Taxes, Mortgage Interest, Charitable Contributions, Medical Expenses if over 7.5% of Adjusted Gross Income
- ☐ 13. Energy related expenses: New furnace, windows, doors, insulation, solar
- ☐ 14. Any significant changes from last year. If new to Erb Financial, a copy of last year's return
- ☐ 15. Any other income, deductions, questions, or information you think might impact your tax return (Space for notes below).
- ☐ 16. Current Phone number: ___________________________ Best time to call: ___________
- ☐ 17. E-mail: ____

We will call you to discuss your tax information before completing your returns. At that time we can review your situation to make sure we have all of the necessary information to properly complete your tax forms.

Notes:

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Visit us at ErbFinancial.com