

林麗淑會計師事務所專業公司
Lisu L. Tan & Co., Ltd., CPAs

Please Provide the Following for Individual Income Tax Returns

1. Incomes:
 - a. Form W-2's & Form 1099's
 - b. Form K-1's
 - c. Interest Income and Dividend Income—Form 1099-Int's & Form 1099-Div's
 - d. Rental Property Income information
 - e. Capital Gain information, for example, stock transaction statement(s).

2. Expenses and Deductions:
 - a. Mortgage Interest Payment information, including those for refinance
 - b. Property Tax Payment information, including your primary home, secondary home, and rental property(ies) listed clearly.
 - c. The name(s), address(es), and Tax ID(s) of the Child Care Provider(s)
 - d. Retirement Account (IRA) contribution information
 - e. Rental Property Expense information
 - f. Investment Expenses and Business Expenses
 - g. Documents for Medical Expenses
 - h. Capital Loss information, for example, stock transaction statement(s).
 - i. Real Estate transaction documents
 - j. Moving Expenses
 - k. Tuition for college or university education

3. Others:
 - a. Tax Forms received IRS and State Taxing Authorities
 - b. Form 1040 of last year
 - c. Estimate Tax Payments information
 - d. The SSNs of yourself, your spouse and your dependents
 - e. The birth dates of yourself, your spouse, and your dependents

Please collect the above information where applicable. Please contact our staff members or the Accountant for any questions. Thank you!