

Dear Client,

Below is a partial list of the documents we will need. Please note that not all items will apply to you, and that you may have items not on the list. If you have a question about an item, please feel free to contact us.

- A copy of your prior year Federal, State & Local returns (if we did not prepare them)
- Form(s) W-2 for wages, salaries, tips, and gambling income
- Form(s) 1099 for interest, dividends, pensions, royalties, real estate proceeds, sales of securities, IRA distributions, and other miscellaneous income.
- Form(s) 1098 for interest paid on education loans, tuition payments, mortgage interest, etc.
- Schedule(s) K-1 for partnerships, estates, trusts, & S-corporations.
- Closing statements for the sale or refinancing of real property.
- Medical bills, tax bills, mortgage and other interest statements, charitable contributions, and receipts for other itemized deductions.
- Employee business expenses
- Secondary school education expenses
- Business income and expenses.
- Rental income & expenses.
- Royalty income & expenses.
- If claiming mileage, need total miles for the year and miles for each activity (business, rental, employee, medical, charitable)
- Any tax notices sent to you by the IRS or other taxing authority.

Thank you for the opportunity to serve you better. Please call if you have any questions.

R. E. Duncan & Company, CPA