



Individual Checklist

This Checklist will assist you in gathering documents necessary for your meeting and the preparation of your Tax Return.

<input type="checkbox"/>	W-2	Annual income summary received from your employer
<input type="checkbox"/>	1099-Int	Interest income reported by Banks & Financial institutions
<input type="checkbox"/>	1099-Div	Dividend income reported by Banks & Financial institutions
<input type="checkbox"/>	1099-Misc	Non-employee Compensation, Rent, Misc
<input type="checkbox"/>	1099-B	Sale of stock Sale of stock - Please fill the attached sheet
<input type="checkbox"/>	1099-S	Sale of Real Estate
<input type="checkbox"/>	1099-R	Retirement or Pension Distributions reported by Financial Intuitions
<input type="checkbox"/>	1099-G	State Refunds
<input type="checkbox"/>	1098-T	Tuition and fees paid to University / College
<input type="checkbox"/>	1098	Mortgage Interest, Points and Property Taxes paid
<input type="checkbox"/>	K-1	Issued by S-Corporation, LLC and Partnerships to you as a member
<input type="checkbox"/>	HUD-1	Issued when buying or selling Real Estate