



Specializing in Individual, Small Business, Non-profits, Estate & Trusts

## QUICK CHECK LIST

**Call Metzger Tax at (503) 246-4776 for an appointment**

Appointment Date: \_\_\_\_\_ Appointment Time: \_\_\_\_\_

1. All copies of W-2's, 1099's, and K-1 forms. Also, if you received any **1095(s)** which is information from the Health Insurance Marketplace, we must have copies of these forms.
2. All year-end mortgage loan statements, including those refinanced or paid off and 1098 forms. If you refinanced or got a new mortgage loan, we will need the closing papers.
3. Copy of all closing papers on purchase or sale of home or property.
4. Detailed investment activity reports from your investment brokers. These are usually reported on an annual form 1098.
5. Unemployment compensation and state tax refunds (1099-G), and social security benefits (Form 1099-SSA).
6. For itemized deductions (Yes, we still need these for the State and possibly your Federal return): Property tax statement, mortgage interest 1098 form, out of pocket medical costs, **proof of contributions**.
7. Schedule summarizing business or rental income and expenses (by property). We have worksheets available to assist – just give us a call.
8. Payment record of estimated tax payments paid for the year including date and amount.
9. Child Care: Name of child along with the name, address, social security or I.D. and amount paid to each provider.
10. Any IRS or State correspondence you may have received during the year.
11. College breakdown: Payment schedule for tuition, fees, books and supplies, and 1099-T from institution.
12. If you changed bank accounts or if we do not have bank account information, please enclose a voided check of your current bank, if you wish to electronically file.
13. We are required to have copies of a government issued ID for all personal listed on the tax return. Birth certificates, driver licenses, and/or social security cards are the best to share with us.
14. If you were a past client and would like a **detailed organizer** listing your specific areas of taxation, please e-mail us at Karen@metzger-tax.com or call (503) 246-4776.
15. New clients – Welcome. We will need your prior 3 years tax returns, if not previously supplied.

**Please call us if you have any questions – 503-246-4776.**