



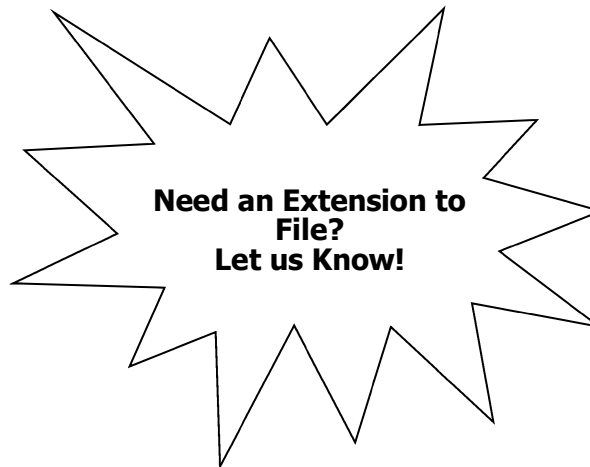
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CHECK LIST:

Most Common Deductible and Credit Items

- 1099-E Student Loan Interest Paid
- 1098 -T Tuition Statement
- Dependent Care Expenses Paid
- Rental Property Expenses
- Self Employment Expenses
- 1095A Health Insurance Marketplace
- Record of Estimated Payments
- Closing Statements on Home Sale, Purchase or Refinance
- Contributions to IRAs
- Teacher's - Classroom Expenses



- 1098-Mortgage Interest
- Real Estate Tax Statements
- Personal Property Tax Statements
- Gifts to Charity—Cash or Check
- Gifts to Charity—Non Cash
- Mileage on behalf of Charity
- Medical Expenses
- Mileage related to Medical Expenses
- Health Insurance—1095B or 1095C
- Contributions to Health Savings Accounts

APPOINTMENT

Date: _____
Time: _____

Did you Receive, Buy, or Sell or Gift a Digital Asset This Year?

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Our Web site has the latest tax news.
As well as Many Tax Forms



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TAX DOCUMENT ENVELOPE

Name _____

Preferred Method of Contact:

Email _____

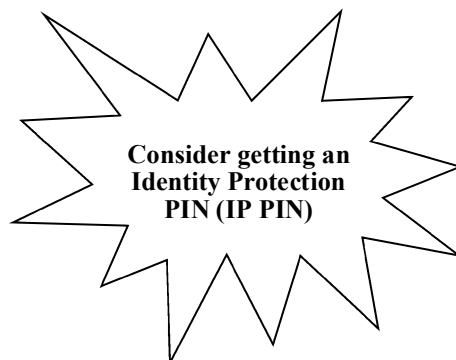
Call _____

Text _____

CHECK LIST:

Most Common Income Items

- W-2 Earnings from Each Employer
- 1099 Interest from Financial Institutions
- 1099 Dividend from Brokerages
- 1099 G State Tax Refunds Received
- 1099 G Gambling Winnings
- SSA 1099 Social Security Benefit Statement
- 1099 B Proceeds from Stock Sales
-



- 1099 G Unemployment Compensation
- 1099 R Pension and Retirement Plan Withdrawals
- 1099 M Miscellaneous Income
- 1099 NEC Non Employee Compensation
- K-1 Partnership, S Corporation or Trust Income
- Rental Income
- Alimony Received
- Self Employment Income



We will call, email or
text when your taxes
are complete

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