



## **HEMENWAY BUSINESS SERVICE**

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### **THINGS TO BRING LIST**

*To better serve you please make sure you bring the following for your tax appointment:*

- Copy of previous year Income Tax Return (*new clients only*)
- ALL** copies of W-2s, 1099s, and K-1 Forms
- ALL** year end lender loan statements (mortgages) – including those loans refinanced or paid off during the year
- Tax Year Escrow Statements
- Property Tax Statements for tax year
- Landlord's name and address (if you rent)
- 1099 Forms reporting **ALL** stock sales for tax year. *Also you MUST provide information on when you originally purchased these stocks and how much you paid for them*
- 1099 Forms reporting Unemployment Compensation, State and Local Income Tax Refunds, and Social Security Benefits
- 5498 Forms for **ALL** IRA Accounts, as well as 1099 Forms for retirement account transfers
- Social Security Numbers and birth dates for **ALL** dependents
- Record of any paid estimated taxes
- Name, Address, and Social Security Numbers of **ALL** child care providers
- Any other document you feel may be needed
- Completed “*Itemized Deduction Checklist*” or “*Business Deduction Checklist*”

**DISCLAIMER:** *This worksheet is provided as a guideline only and may not reflect all of requirements for your individual circumstances. Please direct any questions to your tax advisor.*