HEMENWAY BUSINESS SERVICE

602 W. Main St., Owosso, MI 48867 989-723-5977 FAX 989-725-8372
108 S. Main St., PO Box 552, Perry, MI 48872 517-625-3209 FAX 517-625-3208

www.hbstax.com

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.*