

What to Bring With You for the Tax Preparation Meeting:

1. A copy of your prior year's federal and state tax returns, if they were not prepared by this office.
2. All W-2's, 1099's and other relevant tax documents.
3. A list of all business expenses, if you earned 1099 income as an independent contractor:

Before the meeting, please go through your check register(s) and credit card statements and create a list of all expenditures made during the year in connection with your profession. You should also calculate any business-related mileage, which includes driving between job sites and driving to temporary work locations. We have a spreadsheet available in the Client Resources section of our website that can help you categorize typical Healthcare Professional expenses and total your amounts.

4. Credit card statements and check register(s) for all checks you wrote during the year, in case you need to look up a payment.
5. If you bought or sold a house during the year, please bring the Closing Disclosures or Settlement Statements.
6. If you have children, we need each of their social security numbers, as well as the name, address and federal tax ID number for any childcare providers.
7. Please bring the most recent current-year pay stubs if you'd like us to check to see if your withholding will be appropriate for the upcoming year.

If you have any questions that you would like answered before the meeting, please contact us at (800) 471-0045 or e-mail us at admin@schwartzaccountants.com.

