



JLP ACCOUNTING NEW CLIENT CHECK LIST

To prepare your taxes, we will need the following items:

- A copy of your driver's license for you and your wife
- If you have a copy of your last year's Federal 1040 tax return, it is helpful
- Copy of your social security cards for you, your spouse, and your children
- The dates of birth for your children
- W-2 forms (wages from your employers)
- SSA 1099 Forms- Social Security Income
- 1099 forms
 - o Bank Interest 1099int
 - o Unemployment 1099G
 - o IRA distributions 1099R
 - o Pension distributions 1099R
 - o Non-employee compensation 1099NEC
 - o Miscellaneous Income 1099 MISC
 - o Brokerage consolidated 1099 forms (Dividends Interest Stock sales)
- 1098 form (from your mortgage company)
- Real estate taxes paid (If not paid through your mortgage company)
- Your settlement statement regarding the purchase of your home.
- Any daycare expenses (EIN number, address, and how much was paid)
- Donations:
 - ✦ Donations - Misc
 - ✦ Donations - Church
 - ✦ Donations - Non-cash - IE: Salvation Army, Goodwill, Vietnam Vets
- Email and cell numbers
- Official address of your new home (should be on the settlement statement)
- The names of your occupations for you and your wife
- Amount of real estate taxes you paid last year (part of these might be listed on your house settlement sheet.)
- The amount of the Advance child credit you received last year for each child. (This started in July of last year to the end of December) Could have been 250 to 300 per child.
- Form 1095A- (www.healthcare.gov)
- A copy of a voided check(this is for direct deposit or payment of your federal and state taxes.