

## WHAT TO BRING

If you have any of the following items, please bring them with you to your tax interview:

- **New Tax Clients should bring last year's return.**  
We need to know what you told the IRS last year.
- **All Clients should bring a checkbook, credit/debit card or cash.**  
We need to get the account numbers for Direct Deposit of Refunds or Electronic Withdrawals (if you so choose). We also charge a Retainer Fee, payable at the first interview.
- **Business clients should bring income and expense records and balance sheet records for the year**
- W-2 for wages
- Social Security numbers for yourself, spouse and dependents
- Form 1098 for mortgage interest paid
- Form 1099 INT for interest income
- Form 1099 DIV for dividend income
- Form 1099 MISC for non-employee compensation and other income
- Form 1099 B for the sale of stocks and bonds, as well as purchase price and purchase date
- Form 1099 G for state refund information
- Form 1099 R for retirement income
- Any other 1099 you receive
- Record of personal property taxes paid for the year
- Closing statements for the purchase, sale, or refinancing of real property
- K-1 from partnership, S corporation, trust, or estate activity
- Record of unreimbursed business, charity, and medical mileage
- Record of charitable giving
- Student loan interest statements
- Child Care provider address and federal ID number
- Higher or Continuing Education expenses, or 1098-T
- Traditional or Roth IRA contributions or SEP-IRA contributions
- If you paid quarterly estimated taxes, provide the records of amounts, dates and payees. Cancelled checks are best.

### TAX SERVICES AGREEMENT AND PRIVACY POLICY:

Client consents to the disclosure and/or use of tax return information for us to provide tax preparation and planning services. We collect nonpublic personal information about you from the following sources: applications, tax preparation worksheets, organizers and supporting schedules we use in preparing your tax return and other supporting forms; and personal interviews and conferences with you.

We do not disclose any nonpublic information about our customers or former customers to anyone, except as permitted by law. We restrict access to nonpublic personal and account information about you to those of our employees or contractors who need to know that information to provide products and services to you. We maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your nonpublic personal information.

Client authorizes us to complete all Federal and State tax returns required for tax year 2007 from information you have provided. You agree to check the tax return(s) before filing it/ them, keep documentation supporting the information in the return(s) and to pay the fee for such services in full upon completion.

TAX RETURNS WILL NOT BE RELEASED OR E-FILED UNTIL FEE IS PAID IN FULL