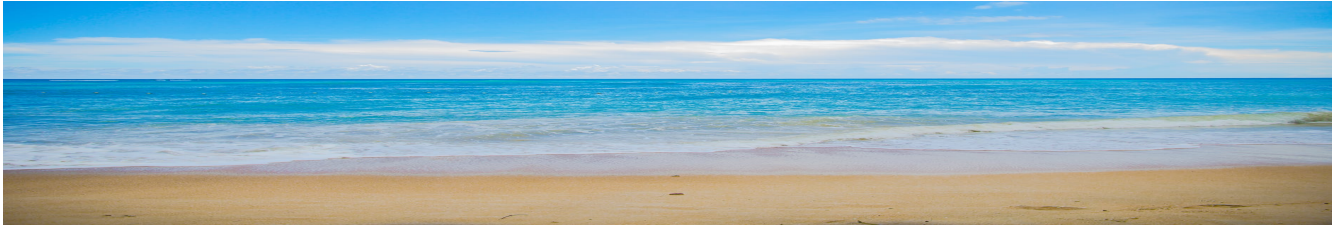


East Coast Taxes



Tax Item Check List... What you will need to bring

Personal Information

- ★ SSN or ITIN, full names and birth dates for everyone included on your return
- ★ If applicable your ex-spouse's social security number
- ★ **Copy of last year's tax return and depreciation schedule if applicable**

Income and Investments

- ★ All forms that say W-2, 1099 or Schedule K-1 from employment, retirement, Investments, unemployment or business ventures.
- ★ Brokerage Statements to reflect purchase and sales throughout the year
- ★ Closing Statements for any real estate purchased or sold
- ★ Rental Income
- ★ Sales of any Business Assets
- ★ Alimony received

Deductions, Adjustments and Credits

- ★ Childcare records including the provider's ID number and amount paid
- ★ 1098E-Student loan interest
- ★ 1098T- Educational expenses with back up documentation to amounts paid
- ★ 1098-Mortgage Interest
- ★ Property Taxes amount paid in prior calendar year
- ★ Excise Taxes for all vehicles-cars, bikes, trailers and boats
- ★ Medical and Dental expenses paid
- ★ Gifts to Charities- Donations and/or Mileage you must maintain receipts in the event of an audit
- ★ Foreign Taxes paid
- ★ Adoption Expenses
- ★ Casualty and Theft losses
- ★ Traditional IRA Contributions
- ★ Federal and State Estimated payments made throughout the year

Healthcare

- ★ Proof of Health Insurance Mandatory! 1095-A for those who receive healthcare through the Market Place. A reconciliation of your account has to be completed at time of filing to avoid an Audit.