

**BATES & BISHOP, INC.**

Certified Public Accountants

**What To Bring To Your Tax Appointment**

<b><u>SITUATION</u></b>	<b><u>WHAT TO BRING</u></b>
If you purchased Rental Property during the year	Closing statement; total rent received; total expenses by category
If you sold Rental Property during the year	Closing statement at sale
If you sold other Real Property during the year	Closing statement for sale; closing statement for purchase
If you had a 1031 (tax free) exchange	Closing statement for sale of old property Closing statement for replacement property
If you refinanced your residence or a rent house	Closing statement
If you sold securities during the year	List each transaction with purchase date, sale date amount of cost and sale proceeds
If you earned wages during the year	W-2 Form
If you had dividend or interest income	1099 form or year end brokerage statement
If you received payments from a retirement plan	1099R Form
If you have income from a Partnership, S Corporation or Beneficiary of a Trust or Estate	K-1 Form
If you were a part of a Partnership or an S Corporation	The amount of your family's' health insurance premiums paid by the S Corp or Partnership
If you paid mortgage interest to an individual	Payee's name, address, social security number and amount paid
If you ran your own business during the year	Schedule with total income received Total expenses by category Purchase contract on any business vehicles purchased
If you used your personal auto for your business	Total miles driven for the year Total business miles driven for the year
If you had an office in your home for your business	Total sq footage of house; sq footage of office space Total utilities, home owners insurance, interest, real estate tax, HOA dues
If you made non-cash donations to charity	Description of the property, fair market value, cost and date acquired A letter from charitable organization if you donated a vehicle
If you had expenses for moving, job-related expense child care, uniforms or similar items	List of each transaction with date, name and description