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[www.ProTaxNow.com](http://www.ProTaxNow.com)

**Most Commonly Forgotten items:**

- \_\_\_ W2's and other Earned Income Statements
- \_\_\_ Mortgage Interest Paid
- \_\_\_ All other 1099 forms
- \_\_\_ Property Taxes Paid on all Real Estate owned
- \_\_\_ SSN#'s for Newborns or new Dependents
- \_\_\_ Day Care Tax ID#
- \_\_\_ DMV (Car Registration) for all Cars, Boats, Trucks, Trailers, Jet Skis, etc.
- \_\_\_ Student Loan Interest Paid
- \_\_\_ 1098T and all Qualified Student Expenses
- \_\_\_ HUD1 Closing Statement for New Purchase, Refinance, and/or Sold Real Estate
- \_\_\_ Checking Routing & Account number for direct deposit of your refund
- \_\_\_ End of Year Investment Statement
- \_\_\_ Retirement Savings Contributions (not deducted from Paycheck)
- \_\_\_ 1095 Health Care Coverage Statement

**New Clients**

- \_\_\_ SSN's and Birthdates for spouse or dependents
- \_\_\_ The last 2 years of tax returns

**Active Duty Military Members**

- \_\_\_ If you have had an Military Move, filled out Move Worksheet

**If you have Rental Real Estate Property**

- \_\_\_ 1098 Mortgage Intrest Statement
- \_\_\_ Rental Real Estate Worksheet

**Small Business Owner**

- \_\_\_ Articles of Organization if opened in this last year.
- \_\_\_ Articles of Amendments if changes have been made in the last year.
- \_\_\_ Small Business Worksheet