



San Dimas, Long Beach, Valencia, Palmdale, Irvine  
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## Most Important & Commonly Forgotten Items

### Existing & New Clients:

- W2's
- Mortgage Interest Paid \$ (all 1098 Forms)
- Property Taxes Paid \$
- SS#'s for Newborns
- Day Care Tax ID#
- DMV (Car Registration) for all Cars, boats, trucks, trailers, jet skis, etc
- Student Loan Interest Paid
- Tuition
- Final Closing/Settlement Statement for New Purchase or Refinance. If you are not sure what this is or where to find it, call your escrow company and they should be able to fax or email it to you.
- Deduction Sheets that apply to you

### New Clients Only:

- All of the Items above
- The last 2 years of tax returns
- If you can't find last years tax return, we at least need the amount of the tax you received or paid from the State only from the previous tax year.
- Any & All SS#'s and Birthdates for any spouses or dependants
- Checking Account # and Routing # for direct deposit of your refund

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