# WHAT TO BRING TO YOUR TAX INTERVIEW

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| **NEW CLIENTS ONLY** | | ☐ Child Care Expenses/Documentation |
| ☐ Last Three Years Tax Returns | | ☐ DMV Fees Paid on Vehicles |
| ☐ Your/Spouse/Dependent's SSNs | | ☐ Interest Paid (Mortgage, Car, Etc.) |
| ☐ U.S. Tax ID Number for non-citizens who must file | | ☐ Taxes Paid (Real Estate, Sales, etc.) |
| ☐ Birthdate Info. (You, Spouse, Dependents) | | ☐ Medical & Dental Expenses |
| ☐ | | ☐ Work-Related Expenses/Mileage Log |
| **ALL CLIENTS (NEW & RETURNING)** | | ☐ Estimated State & Federal Payments |
| ☐ All W-2, 1099s & 1098s | | ☐ Purchase or Sale of Residence Records |
| ☐ Interest & Dividend Income | | ☐ Charitable Donations |
| ☐ Pension & Retirement Income | | ☐ |
| ☐ Gambling Winning & Losses | | ☐ |
| ☐ Social Security/Unemployment Ins. | | **FOR BUSINESS/RENTAL CLIENTS** |
| ☐ Alimony Paid or Received | | ☐ Self-Employment Income & Expenses |
| ☐ State/Local Refunds or Amount Due | | ☐ Income & Expense From Rentals |
| ☐ Stock Purchase & Sale Cost/Dates | | ☐ Office-In-Home Information |
| ☐ Year-End IRA, 401K Statements | | ☐ Mileage Log/Vehicle Information |
| ☐ Education Expenses/Student Loan Interest | | ☐ |
| ☐ Legal Documents, divorce, adoption, custody | | ☐ |
| ☐ Moving Expenses | | ☐ |
| ☐ | | ☐ |

RPM & ASSOCIATES

(619) 589-8680

US-TAXLAWS.COM

WE MAKE YOUR TAXES WORK FOR YOU

R. Patrick Michael, EA ◆ Tax and Financial Services ◆ 7800 University Avenue, Suite A-2 ◆ La Mesa, CA 91942