

Executive Public Accountants Inc.

Forms you may need to prepare your tax return

If any of the following pertain to you please provide documentation to us.

- (New Clients Only) Previous years tax returns
- (New Clients Only) Proof of date of Birth & Social Security Number for self & dependents
- W-2 Statements (W2)
- Unemployment Income (1099G)
- Interest and Dividend Income (1099 INT / DIV)
- Original Purchase Date & Price of Stock sold (if not on brokerage statement)
- All other 1099 Forms
- Year- End Investment & Brokerage Statements
- Social Security Income Statements
- IRA Contribution & withdraw amounts
- Business Income & Expenses (fill out worksheet)
- Medical Expenses
- Long Term Care Insurance Premium Amount and policy #
- Property Tax and Real Estate statement
- Vehicle License Tab renewal cost (make list of renewals cost per vehicle)
- Mortgage Interest Statements (Form 1098)
- Charitable Contributions - monetary (Must be 501c3 make list with total per charity)
- Charitable Contributions Non-cash (Must be 501c3 fill out charitable donation form))
- Rental Property Income and Expenses (fill out worksheet)
- Student Tuition& interest forms (paid by loan or other. ie. 1098T, 1098E)
- Daycare Expense per child. (Provider name, address & Fed ID#)
- Canceled Debt (1099C)
- Estimated tax payment (make a list of amount and date)
- K-12 School Expenses (fill out K-12 school expense worksheet)
- Property Tax Refund \$ _____

▪ **Additional worksheets are available on our website at www.epamn.com “Resources”**

Please print out any forms that pertain to your tax situation. If you do not have internet access, please call to request a paper copy be mailed to you.

▪ **All Tax Returns must be paid in full before we are able to e-file.**

Payments can be mailed or paid with credit card online on our website. Go to <http://epamn.com>. Go to bottom on home page & Click PAYMENTS then enter your name and click “Buy Now” button, and follow the steps.

*We provide a **secure & safe** method of payment by credit card, debit card or money transfer through PayPay. You DO NOT need a PayPal account to pay us with Paypal. PayPal is a widely recognized and long established method for processing online payments.*