

# Tracey S. Peters, CPA, LLC

## Pre-Appointment Checklist

### Checklist of Information to Bring to an Appointment

- Copy of Last Year's Tax Returns
- W-2s
- Interest & Dividend Income
- Stock Sales or Broker Statements
- Self-Employment Income & Expenses
- Sale of Personal Residence & Re-Finance Papers (HUD-1s)
- Rental Income & Expenses
- Gambling & Lottery Winnings
- State Income Tax Refund
- Pension Income
- Estimated Taxes Paid
- Social Security Year-End Statement
- IRA or 401(k) Distributions & Contributions
- Unemployment Compensation
- Medical Expenses
- Real Estate Taxes
- Mortgage Interest
- Charitable Contributions
- Employee Business Expenses
- Gambling Losses
- Employment-Related Moving Expenses
- Childcare Expenses
- Higher Education Expenses