

**Ernest L Tomkiewicz CPA PLLC
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Documents to bring to your appointment

DRIVER'S LICENSE

PRIOR YEAR TAX RETURN

DEPENDENT INFORMATION

Name
DOB
Social Security Number
Document for Proof of Residency

ACCOUNT INFORMATION FOR DD/EFT

Bank Name
Account Number
Routing Number
Account Type

INCOME FROM:

Scholarship
W2
Interest
Dividends
Stock Sales
IRA
Pension
Social Security
Alimony
Unemployment
Rental Income
Gambling
State Tax Refund
1099 Misc.
Self Employment Income
 Records
 QB
 P&L
 BUH Expenses
 Auto Expenses
 Assets

Farm Income
 See list above*

Rental income
 See Questionnaire

Partnership
Estate or Trust
S corp
Sale of Property
Sale of Assets
Virtual Currency
Foreign Assets or Accounts
Cancelled Debt
Timber Income
Hobby Income
Tip Income
Workers Comp
Disability
Other?

EXPENSES/DEDUCTIONS:

Educator Expenses
SEP SIMPLE Contributions
IRA Contributions
Self Employed Health Insurance
Estimated Tax Payments
Child/Dependent Care
 EIC/CTC Questionnaire
HSA Account
Casualty/Theft Losses
Tuition Paid
School Loan Interest
Provided Support for Someone
Adoption
Healthcare Through the Marketplace
Other?

SCHEDULE A

Health Care Spending
Doctor/Prescriptions
Real Estate Taxes Paid
Mortgage Interest Paid
Charitable Giving

PRIOR YEAR INFORMATION:

NOL
Passive Loss
Capital Loss
Other loss Carry Forward

STATE RESIDENT INFO:

Rent (MA)
Healthcare Insurer
Subscriber Number
EIN