

HIGBY TAX

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ITEMS TO BRING TO YOUR TAX APPOINTMENT

- LAST TWO YEARS TAX RETURNS (NEW CLIENTS ONLY)
- SSN CARD OR COPY OF SSN CARD (NEW CLIENT ONLY)
- VOIDED CHECK – NOT A DEPOSIT SLIP!!
- COPY OF CURRENT YEAR INCOME TAX RETURNS FILED BY/FOR DEPENDENTS
- LEGAL PAPERS FOR ADOPTION, DIVORCE, OR SEPARATION INVOLVING CUSTODY OF YOUR DEPENDENT CHILDREN.
- ANY CORRESPONDENCE FROM IRS OR FTB
- W-2's
- 1099's
 - DIVIDENDS
 - INTEREST
 - PENSIONS
 - SOCIAL SECURITY STATEMENT
 - UNEMPLOYMENT
 - IRA DISTRIBUTIONS/ROLLOVERS
- K-1's
 - PARTNERSHIPS
 - S-CORPORATIONS
 - ESTATES & TRUSTS
- STOCK\MUTUAL FUND:
 - PURCHASE AND SALE INFORMATION INCLUDING DATES & AMOUNTS
- NEW HOME \ REFINANCE\SHORT SALE\FORECLOSURE:
 - ESCROW PAPERS – FINAL\CERTIFIED TO BE CORRECT
 - MOVING EXPENSES (ONLY OVER 50 MILES CLOSER TO WORK)
- MORTGAGE STATEMENT \ REAL ESTATE TAX ON HOME AND OTHER PROPERTIES
- DMV REGISTRATIONS
- PURCHASE CONTRACTS ON NEW VEHICLES
- SCHEDULE SUMMARIZING BUSINESS AND/OR RENTAL EXPENSES
- NAME OF CHILD CARE PROVIDERS
 - ADDRESS
 - SOCIAL SECURITY NUMBER\FEDERAL ID NUMBER
 - TELEPHONE NUMBER