

Hal E. Hershkowitz
Certified Public Accountant

Daniel D. Kunitzer
Certified Public Accountant

Appointment Check List

Appointment Date: _____ Appointment Time: _____

Be Sure to Bring All of the Following With You:

- All Copies of W-2's
- Social Security numbers and dates of birth for all dependents (if not previously supplied)
- 1099 Forms Reporting All:
 - Interest and Dividends from Savings Accounts, Money Markets, Mutual Funds, Stocks, Bonds, etc.
 - Non-Employee Compensation
 - Unemployment Compensation (Insurance)
- 1099 forms reporting all stock sales for 2012 as well as original purchase date and cost information
- 1099 forms for all Retirement Fund transfers and Social Security benefits
- Copies of all K-1's (Partnership, S Corporation, Estates & Trusts)
- Gain and Loss schedules for sales of securities
- Summarization of Business or Rental Income and Expenses, if applicable
- Date and amount of each estimated tax payment
- Name, Address and ID or Social Security number of all child care providers and amounts paid for each child per provider
- Itemized Deductions:
 - Medical Expenses
 - Real Estate Taxes
 - Mortgage, Home Equity and Investment Interest Paid (Including Forms 1098)
 - Contributions, Cash and Non-Cash
 - Casualty and Theft Losses
 - Unreimbursed Employee Expenses
 - Investment and Safe Deposit Expenses
 - Tax Preparation Fee for 2011
- Copy of 2011 Tax Return (for new clients only)
- Closing Papers for:
 - Purchase of New Residence
 - Sale of Old Residence (including original purchase documentation)
 - Any Refinancing done in 2012
- Moving Expenses
- Higher Education Expenses (1098T)
- Year End IRA and 401K Statements
- December 31, 2012 or Annual Brokerage Statements
- Any correspondence received from tax agencies during the year