BAY WIDE TAX SERVICE

3633 Thornton Ave   Fremont CA 94536
Tel 510.796.1411   Fax 510.796.1420

Checklist – *what to bring to your appointment*

INCOME

All W-2 Forms:

❍ Employer Wages
❍ Gambling Winnings

All 1099 Forms:

❍ Pension and/or IRA Distribution
❍ Government Payments
(State Refunds, Unemployment)
❍ Bank Interest
(these may be included on your year-end statements)
❍ Dividends Earned
(these may be included on your year-end statements)
❍ Social Security Statement
❍ Income from any Source
❍ Cancellation of Debt
❍ Real Estate Transactions

New Client

❍ Names, SSN's, DOB's of all family members

Current Client

❍ New family member Names, SSN's, DOB's, or any changes required

Address, Telephone, email

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EXPENSES

❍ Mortgage Interest Paid
❍ Real Estate Taxes
❍ Vehicle Registration(s)
❍ Real Estate Closing Statements
❍ Cash / Non Cash Contributions
❍ Tax Preparation Fees paid
❍ Medical Expenses
(Doctor, Dentists, Prescription & Hospital Co-pays;
Post Tax Insurance Premiums Paid; Mileage)
❍ Sales Tax Paid on Large Purchase Items (i.e. car)
❍ Non-Reimbursed Work-Related Expenses
❍ Child Care Expenses
❍ Tuition Statements
❍ Student Loan Interest Paid
❍ Investment Expenses
❍ Job-Hunting Expenses
❍ Moving Expenses
❍ Adoption Fees
❍ Alimony Paid
❍ IRA or other Retirement Plan Payments

Rental Property Data

❍ Rental Income Received
❍ Mortgage Interest Paid
❍ Real Estate Taxes Paid
❍ Rental Property Insurance Paid
❍ Renovation and Repair Costs
❍ Homeowner's Association Dues

Self-Employment Data

❍ Business Income (1099-Misc , Personal Records)
❍ Business Related Expenses
❍ Schedule K-1 Income
❍ Employment and other Business Taxes Paid

If you are unsure about any documents, please bring them with you and we will help determine how or if they apply to your current taxes.

Please call early to get your preferred date and time.

taxes@baywidetaxservice.com   www.baywidetaxservice.com