

**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 2010 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 2009
- Copy of 2009 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 2010
- Moving Expenses
- Higher Education Expenses (1098T)
- Year End IRA and 401K Statements
- December 31, 2010 or Annual Brokerage Statements
- Any correspondence received from tax agencies during the year