D'ANGELO & ASSOCIATES
A Professional Corporation
Certified Public Accountants

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www.dangelocpa.com

CHECKLIST OF ITEMS TO BRING FOR YOUR TO MEETING: For your convenience we've provided a checklist of the items you should bring to your next appointment. Please print this out (you may need to download the free Adobe Acrobat Reader) and assemble the documents. We appreciate your choosing of D'Angelo & Associates for your tax needs.

- A copy of the Social Security Card for each family member, if not previously provided
- A copy of your last year's tax return, if not prepared by this office.
- Form(s) W-2 (wages, etc.) Form(s) 1099 (miscellaneous, interest, dividends, etc.)
- Schedule(s) K-1 (income/loss from partnerships, S-corporations, etc.)
- Form(s) 1098 (mortgage interest) and property tax statement.
- Brokerage statements from stock, bond or other investment transactions.
- Closing statements pertaining to any real estate transaction (purchase, sale, refinance).
- Completed and totaled mileage logs for work or business.
- Your physical inventory of the cost of business merchandise not yet sold as of December 31st
- DMV fees paid (VLF portion)
- A11 supporting documents (schedules, checkbooks, etc.)
- Any tax notices received from the IRS or other taxing authorities.
- For non-cash charitable contributions of $250 or more, you must have a receipt from the institution detailing each item and the value. For non-cash contributions of $5,000 or more, you must obtain an appraisal of the item(s) donated.
- Please bring in your home office measurements, if not previously provided.
- Individuals who have changed their name after marriage or divorces must change their name with the Social Security Administration. The IRS matches the Social Security Administration master file for verification of name and social security number. If these do not match, the IRS disallows the deduction for the person being claimed. If you are unsure, take a moment to call the Social Security Administration and verify this information and make changes as necessary.
- Bring any statement from your mutual fund company so we can get breakdown of U.S. government and state tax-exempt income information.
- Names, ages, and amounts spent on child care for employees' children by business owners for employers' child care contribution credit.
- For the child and dependent care credit, bring the total of any non-taxable funds received, including child support and public assistance; percentage of time the qualifying dependent lived in the California home of the taxpayer; and telephone number of the care provider.
- Information regarding disaster losses.
- For military personnel, dates in combat zones.