

## 21 of the Most Commonly Forgotten Items

We provide our *existing* clients with a tailored “organizer” that lists every item from your return in the prior year. It’s a nice reminder check-list. If you use that list, you can disregard these commonly forgotten items.

If you are a *first year client*, a generic organizer is available on the web site at [www.wktaxaccountants.com](http://www.wktaxaccountants.com).

The list below is our accumulation of the most forgotten items. It’s not meant to be an all-inclusive list. Scan this list, assemble your documents, and we will let you know what else, if anything, we will need.

### Employees:

1. Last year’s tax return (only if you are a new client).
2. Charitable contributions for the year. If you have made non-cash contributions we need this amount separately. If the non-cash contribution was over \$500 we will need the charities’ name and full address. We do not need to see the actual charitable receipts (a list with the totals is just fine).
3. If you sold stocks please make sure you have the original date of purchase and the cost basis related to the shares. The cost basis is the original cost plus any dividends reinvested. Your brokerage firm should be able to provide this to you.
4. Any traditional IRA or ROTH IRA contributions made for the tax year.
5. Estimated payments made to the IRS and NJ. We need the date of payment and the amount. We know what we recommended last year, but it’s best to confirm what you have paid.
6. Child Care Costs -- If you have childcare costs please include the amount per child. We also need the organizations full address and EIN number.
7. Don’t forget to mention any new additions to the family!
8. If you have a child in college please include the college name and the tuition amount.
9. If you sold or purchased a home please include a copy of your HUD statement. It often includes tax-deductible items. Let us know if you paid any points on a new home or refinance.
10. Please mark accounts that are in your tax organizer that have been closed. We scan your accounts from last year to make sure they have all been accounted for in the current year.
11. A signed copy of our engagement letter and your current email address.

**Rental Property Items**

1. Total rents received for the year.
2. Expenses paid by year. Try to group them together, if not we will do it for you.
3. A list of any assets/big expenditures you purchased this year and the date purchased. For example, new sidewalks, roof, heating systems, etc.
4. If you used the property for personal purposes and for rental purposes, we will need the percentage of the year used for each.

**Self-Employed Individuals**

1. Don't forget your health insurance paid for the year.
2. Miles driven for business

**Business Tax Returns**

1. Operating Agreements
2. Articles of incorporation
3. Any loan agreements
4. Prior year's tax return and tax elections (first year clients only)