

PULLEY TAX SERVICE

Important & Commonly Forgotten Items

All Clients, New & Existing:

- _____ Current & Unexpired Government Issued ID
- _____ W2's from all employers
- _____ Mortgage Interest Paid \$ (all 1098 Forms)
- _____ Property Taxes Paid \$
- _____ Social Security Card of Newborn
- _____ Day Care Tax ID#, Name, Address, Phone #, Amount Paid
- _____ DMV (Car Registration) for all Cars, boats, trucks, trailers, jet skis, etc.
- _____ Student Loan Interest Paid (Form 1098-E)
- _____ Tuition, 1098T & Book Receipts
- _____ Final Closing/Settlement Statement for New Purchase or Refinance
if you are not sure what this is or where to find it, call your escrow
company and they would be able to fax or email to you.
- _____ Self-employment deduction sheets (that apply to you)
- _____ 1099 (Interest, Dividends, Misc)

New Clients:

- _____ All of the Items above
- _____ The last 3 years of tax returns
- _____ Any & all Social Security Cards and Birthdates for spouses & dependents
- _____ Checking Account # and Routing # to direct deposit of your refund