

WHAT TO BRING TO YOUR INDIVIDUAL TAX APPOINTMENT

Individual Income Taxes

We're complimented by your choosing You Money Matters to assist you in filing your tax return, thank you. In order to make our time together the most beneficial, please gather and bring the following documents to our scheduled interview. (If your appointment is being conducted via telephone please provide a fax or email of these documents. Our confidential efax number is 949-534-7001, or email to office@ymminc.com.) Please call us with any questions 949-766-0209, we look forward to meeting with you soon!

- Completed Tax Organizer
- W2/W2G/1099R – Annual tax reports from earnings, gambling winnings, pension income
- 1099 MISC Income – Independent contractor or commission income statements
- 1099 INT/1099 DIV – Bank and brokerage interest & dividend statements
- 1099S/1099C – Annual tax reports of sold assets or cancelled debt
- K1 forms from any S-corp, Partnership, LLC, Trust you have ownership in
- Year End Brokerage statements showing all trades and income details
- 1099G – Government income from refunds, unemployment, PFL, Social Security
- 1098/1098T – Annual interest on mortgages, tuitions paid, student loan interest paid
- Business Profit & Loss Statements detailing income and expenses
- Rental Profit & Loss Statements detailing income and expenses
- Child Care provider name, address, phone number, tax id#
- Real Estate purchase/sale/refinance closing statements
- Latest 401k/IRA/ROTH/403b account statements
- Latest Auto Insurance/Homeowners Insurance Policy statements