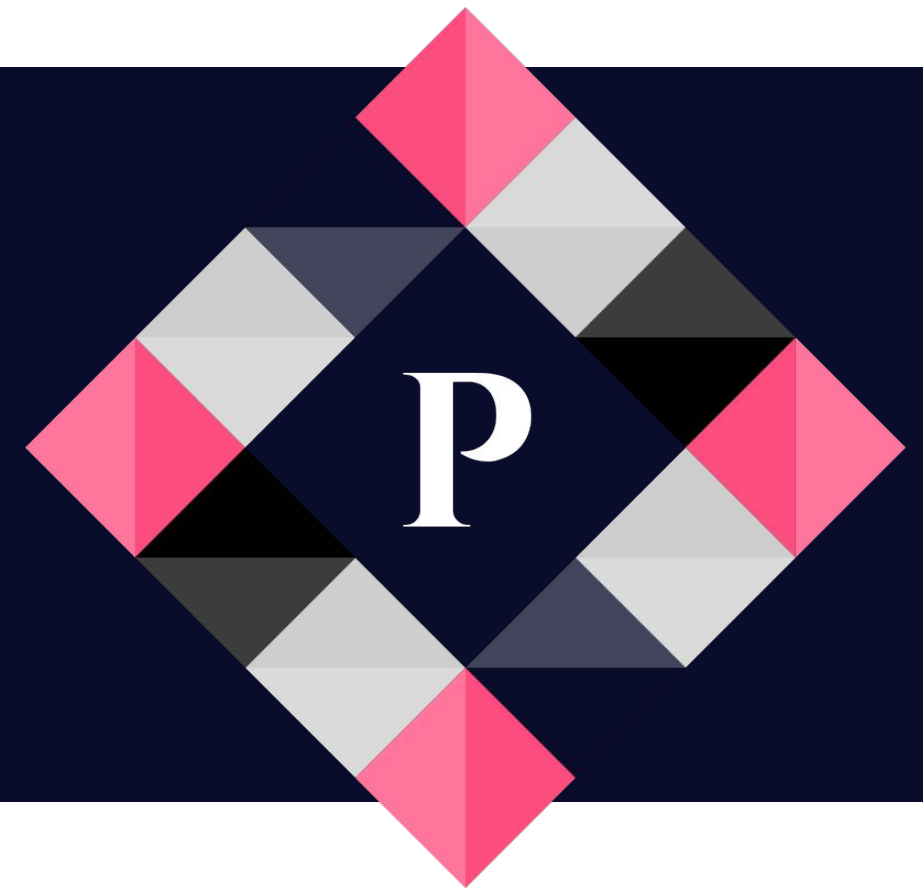


PATELIS TAX

Tax Return ✓ Checklist



W-2's 1099 Forms

Day Care Tax ID#, address & amount paid

Tuition Statement Form 1098-T

As well as any additional expenses paid out of pocket (ex. books, classroom supplies, etc).



OWN A HOME? YOU WILL NEED THE FOLLOWING:

1st time buyer, you will need to bring in your HUD

Mortgage interest form Property Taxes

Association Fees *(if applicable)*



PROOF OF HEALTH INSURANCE *(only one will apply):*

Form 1095-A; *Coverage provided by the Market Place*

Form 1095-B; *Self-funded groups/ small business (SHOP), or fully insured employer plan*

Form 1095-C; *Coverage provided by employer*

Have a rental? Are you self-employed? Or want to know what deductions are allowable in your field of work?

Visit our website:

WWW.PATELISTAX.COM

OFFICE: 562-381-2253 FAX: 562-381-2049 EMAIL: INFO@PATELISTAX.COM