



Providing a holistic approach to
your tax, accounting and financial needs.

Pre-Appointment Checklist

- Copy of last year's return
- W-2's
- Interest & Dividend Income
- Stock Sales or Broker Statements
- Self-Employment Income & Expenses
- Sale of Personal Residence & Re-Finance Papers (HUD-1's)
- Rental Income & Expenses
- Gambling & Lottery Winnings
- State Income Tax Refund
- Pension Income
- Estimated Taxes Paid
- Social Security Year-End Statement
- IRA or 401(k) Distributions & Contributions
- Unemployment Compensation
- Medical Expenses
- Real Estate Taxes
- Mortgage Interest
- Charitable Contributions
- Employee Business Expenses
- Gambling Losses
- Employment-Related Moving Expenses
- Childcare Expenses
- Higher Education Expenses

Contact Us Today!

410-224-2600

www.EmeraldFinancialPartners.com