



Schwartz & Schwartz, P.C.

CPAs Specializing in Healthcare Professionals

What to Bring With You for the Tax Preparation Meeting:

1. A copy of your prior year's federal and state tax returns, if they were not prepared by this office.
2. All W-2's, 1099's and other relevant tax documents.
3. Your check register(s) for all checks you wrote during the year, in case we need to look anything up.
4. A list of all unreimbursed business expenses:

Before the meeting, please go through your check register(s) and credit card statements and create a list of all expenditures made during the year in connection with your profession. We have a spreadsheet available in the Client Corner section of our website that can help you categorize typical Healthcare Professional expenses and total your amounts.

You should also calculate any business related mileage; which includes driving between job sites and driving to your moonlighting jobs.

5. If you bought or sold a house during the year, please bring the settlement statements.
6. If you moved more than 50 miles in connection with a new job during the year, we need to know the cost of moving your household items, as well as the travel cost for you and your family.
7. If you have children, we need each of their social security numbers, as well as the name, address and federal tax ID number for any childcare providers.
8. Please bring current year's pay stubs if you'd like us to check to see if your withholding will be appropriate for the upcoming year.

If you have any questions that you would like answered before the meeting, please contact us at (800) 471-0045 or e-mail us at admin@schwartzaccountants.com.

