

BOB MCCOMBS & COMPANY

CERTIFIED PUBLIC ACCOUNTANTS

CHECKLIST FOR NEW CLIENTS

- [] The signed "Questions" form, with the relevant yes boxes checked.
- [] Copy B of Form W-2 and 1099-R.
- [] All Forms 1099 for interest, dividends, miscellaneous income, etc.
- [] Brokerage statements showing investment transactions for stocks, bonds, etc.
- [] Year-end statements from mutual funds and stock brokers.
- [] K-1 forms showing income from partnerships, S corporations, estates and trusts.
- [] Statements supporting deductions for mortgage interest and taxes.
- [] Closing statements for real estate purchased, sold, refinance, or converted to business use.
- [] If you claim car expenses, the total and business mileage for each vehicle.
- [] Copies of the last 3 tax returns you filed.