

# BOB MCCOMBS & COMPANY

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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.