

# PULLEY TAX SERVICE

## Most Important & Commonly Forgotten Items

### Existing & New Clients:

- \_\_\_\_\_ Current & Unexpired Government Issued ID
- \_\_\_\_\_ W2's
- \_\_\_\_\_ Mortgage Interest Paid \$ (all 1098 Forms)
- \_\_\_\_\_ Property Taxes Paid \$
- \_\_\_\_\_ SS Card of Newborn
- \_\_\_\_\_ Day Care Tax ID#, Name, Address, Phone #
- \_\_\_\_\_ DMV (Car Registration) for all Cars, boats, trucks, trailers, jet skis, etc.
- \_\_\_\_\_ Student Loan Interest Paid
- \_\_\_\_\_ Tuition, 1098T & Book Receipts
- \_\_\_\_\_ Final Closing/Settlement Statement for New Purchase or Refinance  
if you are not sure what this is or where to find it, call your escrow  
company and they would be able to fax or email to you.
- \_\_\_\_\_ Deduction Sheets that apply to you
- \_\_\_\_\_ 1099 (Interest, Dividends, Misc)

### New Clients Only:

- \_\_\_\_\_ All of the Items above
- \_\_\_\_\_ The last 3 years of tax returns
- \_\_\_\_\_ Any & All SS Card and Birthdates for any spouses or dependents
- \_\_\_\_\_ Checking Account # and Routing # to direct deposit of your refund

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