YORKE

Be sure to enclose the following items with your Tax Organizer:

Social Security Cards – We need copies of your Social Security card and the Social Security cards of your spouse and dependents (if we have not previously prepared your returns).

ALL W-2s – from all employers

ALL 1099s – for example:

1099-A	Acquisition or Abandonment of Secured Property
1099-B	Proceeds from sale of securities (We will need a complete schedule of dates sold, sale proceeds, dates purchased and amount paid for all transactions. Most financial institutions provide this to you in a separate mailing).
1099-C	Cancellation of Debt
1099-DIV	Dividend income
1099-G	State unemployment/State tax refund
1099-INT	Interest income
1099-K	Merchant Card and Third Party Network Payments
1099-MISC	Non-employee compensation
1099-R	Pension/Retirement distribution
1099-SSA	Social Security received
1099-S	Proceeds from sale of real estate (We will need information on when and how much the property was purchased for. If California income taxes were withheld, we will need Form 593-B).

ALL 1098s – for mortgage/home equity loan interest you paid.

ALL K-1s – from partnerships, S-corporations, trusts or estates NOTE: These forms are not required to be delivered to you by January 31st, so they may arrive later than other documents.

ALL Mutual funds statements – for sale of securities showing gains/losses and details of US government and state tax exempt income.

Contracts – on any vehicles purchased or leased during the year

Closing settlement statements – for homes purchased, sold or refinanced during the year.

Copies of 3 years of prior year returns (if we have not previously prepared your returns).

Notices and bills from the IRS and/or state received during year

Property tax statements for all real estate owned

All questions or concerns you have about your finances, insurance, retirement and investments.

Yorke & Associates CPAs, Inc. 9140 Haven Avenue, Suite 105
Rancho Cucamonga, CA 91730
(909) 944-0770
(866) 866-8329 toll-free
(909) 944-0990 fax
www.YorkeCPAs.com