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secure email for documents: <http://amyritt.myfileguardian.com>

**Tax Client Name:**

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You may submit your documents electronically using the secure email.

**Please provide the following Tax documents needed to prepare your return**

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| <input type="checkbox"/> 1099-INT                            | <input type="checkbox"/> 1099-DIV (or 1099-Comp)           |
| <input type="checkbox"/> 1099-B (Investment Sales)           | <input type="checkbox"/> K-1 (Scorp or Partnership Income) |
| <input type="checkbox"/> 1098 (Home Mortgage)                | <input type="checkbox"/> W2 (wages)                        |
| <input type="checkbox"/> 1099R (Retirement)                  | <input type="checkbox"/> RRB-1099 (Railroad retirement)    |
| <input type="checkbox"/> SSA-1099 (Social Security benefits) | <input type="checkbox"/> 1099-Q                            |
| <input type="checkbox"/> K-1 Partnership                     | <input type="checkbox"/> K-1 Trusts                        |
| <input type="checkbox"/> 1099-G Unemployment Compensation    | <input type="checkbox"/> 1095 (for insurance)              |
| <input type="checkbox"/> 1099SA HSA Distributions            | <input type="checkbox"/> 1098T (Tuition)                   |

**Please provide the following information needed to prepare your tax return**

- What is your current mailing address?
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- Did your marital status change from your 2016 tax return?
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- Were there any changes in dependents from your 2016 tax return? For all additions to dependents, please list all dependents with their social security number and date of birth.
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- If you do NOT want to electronically file your tax return, please list the reason way as I am required to electronically file unless you specifically refuse.

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- Did you have any child or dependent care expenses? Please include the provider's name, address, SSN/ITIN or EIN, and amount paid.
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- Did you buy or sell stocks, mutual funds, bonds, or other investment properties? Please provide year end investment statement.
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- Did you buy, sell, or refinance your home? Please provide Settlement Statements
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- Did you donate money, clothes, cars, or stock?
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- Did you incur any tuition or continuing education expenses? Please include 1099-T
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- Did you receive a distribution from or make a contribution to a retirement plan (401(k), IRA, etc.)? Please include 1099R for distributions
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- Did you and your dependents have health care coverage for the full-year? Please provide 1095 form (1095A, 1095B or 1095C or combination of all three).
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- For direct deposit, please provide your bank name and last 4 digits if you have direct deposited previously. If new bank account please provide routing and full account number?
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- Did you have a business? Please provide year-end totals of income and expenses associated with the business. You may download the "Business Organizer" from my website [www.amyritt.com](http://www.amyritt.com) to help organize your receipts.
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- Did you have rental properties? Please provide year-end totals of rents received and expenses associated with the rental. You may download the "Rental Property" organizer from my website [www.amyritt.com](http://www.amyritt.com) to help organize your receipts.
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- Did you make HSA contributions? Please provide total amount contributed and the 5498 if possible (form prepared by your HSA administrator - you may have to go online to their website and download, typically not mailed until after tax deadline as you can contribute up until the tax deadline).
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Please list any questions or other concerns you might have that we need to discuss.

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