



## TAX SERVICES by: John Salomon Jr. CPA, CFP, PLLC

You should have received your 2019 tax filing documents by now. Here is a handy checklist for you to review:

- ☐ Original W-2 forms from your employer.
- ☐ If you are self-employed, all 1099-MISC forms received.
- ☐ If you are retired, the year-end statement from Social Security.
- ☐ Form 1099-R received from pension income or IRA/Annuity distributions
- ☐ 1099 Interest and Dividend Income forms from your bank or brokerage.
- ☐ 1098 Mortgage Interest paid statement.
- ☐ Property taxes paid, if not shown on form 1098.
- ☐ A list of 2019 charitable contributions.
- ☐ If claiming a childcare credit, the address and SSN of the day care provider.
- ☐ Social security numbers for all **new** dependents.
- ☐ The amount paid for college tuition for you or your dependents, Form 1098-T.
- ☐ Form 1095. You will get this from your health insurance provider. This is
- ☐ Important if you had an interruption in coverage.
- ☐ If I did not prepare your previous tax return, please provide a copy.

When ready to schedule your tax return, please call **Lisa @248-641-4444** or you can schedule your appointment on our website at [www.j2cmonline.com](http://www.j2cmonline.com)

The above covers the most needed items and is not intended to be a comprehensive list. Also, please review the other attachment that asks general questions that will aid in tax preparation.

**Please do not email any tax documents that have your social security number on it.**

As always, I appreciate your business and look forward to our next meeting.

Regards,

John Salomon, Jr., CPA, CFP