



## Individual Income Tax Preparation Items Needed To Prepare Your Returns

Tax Clients,

Subject: Items Needed to Prepare your Returns

Larry Walker, Jr., E.A.

Enrolled Agent

\*Registered Representative

### Items Needed for Individual Tax Preparation

1. **Tax Documents** – Including the following:
  - a. Form W-2 Wage and Tax Statement
  - b. Form W-2c Corrected Wage and Tax Statement
  - c. Form 1099-MISC Miscellaneous Income
  - d. Form 1098 Home Mortgage Interest Statement
  - e. Form 1099-SSA Social Security Benefits
  - f. Form 1099-R Distributions From Retirement Plans
  - g. Form W-2G Certain Gambling Winnings
  - h. Form 1099-B Capital Gains Transactions
  - i. Form 1099-G State Refund Document
  - j. Form 1099-G Unemployment Income
  - k. Form 1098-T Tuition Statement
  - l. Form 1099-C Cancellation of Debt
  - m. Form 1099-INT
  - n. Form 1099-Div Dividends and Distributions
  - o. Form 5498 for IRA's
  - p. Final Brokerage Account Statements
  - q. County Property Tax Bill (if not included on Form 1098)
  - r. Other Forms labeled as "Important Tax Documents".

Send the entire form or statement (front and back) and do not separate the form from the other contents in the envelope.

2. **Business Vehicles** – Total mileage placed on business use vehicles, and the number of those miles that were exclusively for business use. Also include the make, model, and year of the vehicle. If this is not the same vehicle claimed in previous years, then also include the date placed in service and the total cost. (Note: Commuting to and from work is not considered business use.)

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\*Securities offered through H.D. Vest Investment Services<sup>SM</sup>, Member: SIPC

4-Serenity, Inc. is not a registered broker/dealer or independent investment advisory firm.

3. **Rental Properties** – Provide the loan balance and annual interest statement for all Real Estate owned for rental, and investment purposes. (Include the Mortgage Interest Statement - Form 1098, Property Taxes, and Final Mortgage Statements.) Also Provide the amount of rental income received for each property, and the cost of repairs or improvements.
4. **HUD-1 Statements** – Provide the HUD-1 for any property including your residence that was bought, sold, or refinanced during the year.
5. **Home Office Expenses** – Include the total annual cost of rent, electricity, heating, water, trash, security, pest control, lawn care, internet, home telephone, separate phone or fax lines, cellular phones, office supplies, computer equipment, furniture and fixtures, and improvements. Receipts are needed for furniture and fixtures, computer equipment, and office improvements. Also include the total square footage of your home and of the office space used exclusively for business.
6. **Prior Year Tax Returns** – If you are new to 4-Serenity, Inc., we require a copy of your last two filed tax returns.
7. **Disclosure** – Please be sure to disclose whether you have any unfiled tax returns, back tax balances owed, or debts which may be levied against your tax refund. Also disclose whether or not you currently have an installment plan with either the IRS or the State.

Our contact information is as follows:

For US Mail:

4-Serenity, Inc.  
PO Box 390428  
Snellville, GA 30039

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Toll Free Number: (888) 400-0284

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*Larry Walker, Jr., EA, CFS*  
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