

## To help us accurately complete your tax return, please complete our annual Client Intake Form each year

<b>If you had:</b>	<b>Provide:</b>
Employee Wages	W-2
Unemployment	1099-G
Interest Income	1099-INT
Dividends	1099-DIV
Prizes and Awards	1099-MISC
Stock Sales	All pages of Financial Statement
Sold Real Estate (not primary residence)	1099-S, purchase date, purchase price, amount paid for capital improvements, closing costs
IRA Distributions	1099-R
IRA Contributions	5498 or other document showing amount contributed
Social Security	1099-SSA
Gambling Winnings	W-2G as well as amount of gambling losses
College Tuition	1098-T
Education Expenses	Provide amount paid for books and other school related expenses
Student Loan Interest	1098-E
Property Taxes	Property Tax Bill/Receipt
Mortgage Interest	1098
Estimated Tax Payment	Amount and date of EACH payment (Federal and/or State)
Alimony Paid	Date of divorce, name and SSN of recipient and total amount paid
Alimony Received	Date of divorce, total amount received
HSA Funds Used for Medical Bills	1099-SA
HSA Contributions NOT through employer	Provide amount contributed
Income from Self-Employment / 1099-NEC	Fill out <b>Schedule C worksheet</b> on westengraff.com
Income from a Rental Property	Fill out <b>Schedule E worksheet</b> on westengraff.com
Income from a Farm	Fill out <b>Schedule F worksheet</b> on westengraff.com
Daycare	Statement from daycare including EIN, the name(s) of children in daycare, amount paid for EACH child
Cancellation of Debt	1099-C
Marketplace Insurance (Obamacare)	MUST PROVIDE 1095-A
Energy Efficient Improvements on primary residence	Provide receipt or list the item description and cost
Charitable Contributions – Cash	List amount on Client Intake Form
Charitable Contributions – Non-cash	List amount on Client Intake Form
Medical Expenses	List amount on Client Intake Form

Paid Rent	List amount on Client Intake Form
529 Contributions	List name and amount contributed for EACH child
Private School Tuition	School name, EIN, address, the grade and amount of tuition paid for EACH child

**NOTE:** If we did not prepare your tax return LAST YEAR, bring a copy of last year's tax return with your documents

Because every taxpayer's situation is unique, this list is meant to be a general guide. If you have a document you are unsure of, include it with your other tax information. We'd rather have it and not need it, than need it and not have it.

To best complete the information relevant to your unique tax year, complete our **Client Intake Form** located on [www.westengraff.com](http://www.westengraff.com) or you may pick one up at our office:  
413 Milwaukee St, Kewaunee, WI 54216