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CHECKLIST

THINGS YOU CAN TO DO TO GET READY FOR FILING YOUR TAX RETURN

- **Collect your tax records**
    - Amass your W-2 forms, 1098s, 1099s, Schedule K-1, canceled checks, brokerage firm statements, and any other relevant information that will help complete your tax return. You should receive the various forms by the first week in February, but the Schedule K-1s from partnerships, S corporations, trusts and estates in which you have an interest could take months before you receive them.

- **Find last year's return**
    - Review items reported on last year's return to remind you of income and expenses you may have this year. If you need a copy of last year's return, you can obtain one from the IRS (for a fee) or a transcript of the return (for free).

- **If you are an existing client**
    - Use the Personal Tax Organizer I send out in January as your guide. The Organizer will have all your information from the prior year. Either fill it out or check off as you collect the relevant information for your tax return.