

# Year End Review Appointment Checklist

## *What information do I need to provide for my Year End Review Appointment?*

### Personal Tax Planning

Here is the information we will need from you personally. If you do not have exact figures, estimates are fine.



- Year-to-date paystub for any wages earned.
- Personal mortgage interest estimate. (if much different from prior year)
- Personal real estate tax estimate. (if much different from prior year)
- Charitable contributions estimate.
- Stock Sales (Gains or Losses)
- Interest and Dividend income estimate.
- Any personal estimated tax payments for Federal or State.
- Any other items of income to note for 2020.



### S-Corporations

If you have an S-Corporation, this is the information we will need from you to complete your review.



- Year-to-date income/expense for your corporation.
- Projected income/expenses from your appointment date to 12/31/20.
- If you have taken payroll or wages from your corporation - please provide us with you last paystub or withholding information.
- Please provide us with the total of money you have taken from the corporation via - Distributions, Rents, and Wages.
- If you were incorporated in 2020 - we will need your income and expenses split between the "Pre-Incorporation" period, and the "Post-Incorporation" period. If you have questions on this, please let us know.

### Rental Properties

Here is the information we will need if you have Rental Properties in 2020:



- Estimate of Rents/Expenses for each property in 2020.
- If you BOUGHT any rental properties in 2020, we will need to get your purchase information. (typically the settlement statement)
- If you SOLD any rental properties in 2020 we will need the sale information (typically the settlement statement)