

We will need the following documents:

- W-2s, 1099-R forms, Social Security forms, SSA-1099
- All 1099 forms for interest, dividends, and any other income
- Year-end tax reporting statements for all brokerage accounts
- K-1s from partnerships, S-corps, estates and trusts
- 1098 forms for all mortgages
- Final escrow statements for all purchases or sales of real estate
- Completed Questionnaire and/or Organizer
- Our signed Engagement Letter