Bertolas & Pekula, LLC

6575 141st Ave. NW, Suite 200 Phone (763) 421-1819
Ramsey, MN 55303 Fax (763) 421-1093

WHAT TO BRING TO YOUR TAX APPOINTMENT
PERSONAL TAX CLIENTS

Income items

- All of your W-2 Forms from work (All copies of your wages)
- All 1099 Forms from banks, credit unions, brokerage companies, unemployment, retirement and stock sales-including purchase price and date of purchase for any stock sales
- All K-1s from investments in businesses
- W-2G's for gambling income

Deductions

- Daycare provider information, ID number, address of provider and amounts paid
- Education expenses for dependents and taxpayers
- Provide forms 1098 for mortgage interest paid
- Property tax statement for all property taxes paid
- The amount you paid for your car tabs
- The amount of charitable contributions - cash and non-cash
- Bring a summary of any job related expenses
- Bring a summary of your medical expenses

Self-Employed Individuals

- Please provide gross receipts & all 1099 forms
- All expenses for the business and if you purchased a new vehicle, furniture or equipment we will need the purchase date and purchase price
- If you paid any interest on a business vehicle or credit card please obtain that information from the lender

Estimated tax payments

We need check # and dates paid for the federal and state

Please be aware that this is a short list and you will be given a thorough interview to obtain every deduction that is available to you. We do have organizers available for pick-up or to be mailed to you.

New clients please provide a copy of last year's Federal & State tax return and all related schedules.

We will need social security numbers and birthdates for taxpayers and dependents.