



# A&G Accounting & Financial Services, LLC

## Basic Documents

T	S	J	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Legal Name, SSN or ITIN, and date of birth
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Copy (physical or electronic) from prior year tax return
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Vouchers with Estimated taxes paid (if paid)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Driver License (optional)

## Forms Received

T	S	J	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	W2 forms - wage and tax statements
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1095 forms - 1095-A, 1095-B, and 1095-C (Obama Care)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1098 Form - Mortgage interest
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1099 forms - Dividends, Interests received Miscellaneous Income, Retirement Plan Distributions etc.

## Personal Records

T	S	J	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Child and Dependent Care Expenses Records
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Education Expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Medical Expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Vehicle (Personal Property) Taxes Paid
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Real Estate Taxes
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Mortgage Interest Paid

## Personal Records

T	S	J	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Moving Expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Foreign Earned Income and Foreign Taxes Paid
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Business or Employee Expenses (C Schedule and E Schedule)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Gambling Expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Investment Transactions
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Retirement Contributions

## E-file and Bank Records

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bank Information (Routing and Account Number)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit Card Authorization
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Prior year's Self-Select PIN

**A&G Accounting and Financial Services, LLC**  
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