



PALMETTO ACCOUNTING

PROVIDING VALUE TO CLIENTS THAT ENHANCES THEIR BUSINESS SUCCESS

PERSONAL DATA

- Social Security numbers belonging to your spouse and your children
- Birthdates for household
- Childcare provider. Name, address, tax ID or social security number
- Alimony paid, Social Security number of former spouse, date alimony started

EMPLOYMENT AND INCOME DATE

- W-2 forms for the tax year
- Unemployment compensation
- Miscellaneous incomes, including rent
- Partnerships, S Corporation and trust income
- Pensions and annuities
- Social Security/RRR benefits
- Alimony received
- Jury Duty pay
- Gambling and lottery wins
- Prizes and awards
- Scholarships and fellowships
- State and local income tax returns

HOMEOWNER/RENTER DATA

- Residential address(es) for the tax year
- Mortgage interest
- Real Estate closing disclosures and sales information
- Second mortgage interest paid
- Property taxes paid
- Energy credits
- Private mortgage interest documentation

FINANCIAL ASSETS

- Interest income statements
- Dividend income statements
- Proceeds from broker transaction

FINANCIAL LIABILITIES

- Auto loans and leases (car value) if the vehicle is being used for business

Palmetto Accounting, LLC
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Mt. Pleasant, SC 29466
843-608-1008



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- Student loan interest paid
- Early withdrawal penalties on CD's and other deposits

EXPENSES

- Gifts to charity (qualified written statement from charity for any single donations of \$250 or more)
- Unreimbursed expenses related to your volunteer work
- Job related education expenses
- Childcare expenses
- Medical savings account- Balance of HSA at year end.
- Adoption expenses
- Alimony paid
- Tax return preparation fees and expenses

SELF-EMPLOYMENT DATA

- Access to accounting system or spreadsheet
- K-1's from Partnerships or S Corporations
- Business-related expenses: Receipts and other pertinent documents
- Farm-related expenses: Receipts and other pertinent documents
- Employment taxes and other business taxes paid for the current year
- Vehicle- Make, model, percentage of business use and mileage for year
- Home in office deduction for self-employed: Square footage of office/total home

MISCELLANEOUS TAX DOCUMENTS

- Federal, state and local estimated income tax paid for the current year
- IRA or other tax retirement plan contributions: If self-employed, identify as "for self" or "for employees"
- Records of medical expenses
- Records for any other expenditures that may be deductible
- Records for any other revenue or sale of property that you may need to report
- Prior 2 years tax returns

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