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Important things to include with your Tax Appointment
Or
When sending your information to the office

- ❖ Last Year's Tax Return (if new client)
- ❖ All SS# and Birthdates of Children (new clients or new child)
- ❖ 1099 –R retirement
- ❖ 1099 K – Merchant Card and Third Party Network Payments
- ❖ Any 1099 –C, 1099 -Misc, 1099 – INT, & any 1099 form showing income
- ❖ 1099 Misc - Miscellaneous Income
- ❖ Any Brokerage Firm Statements
- ❖ Property Tax Statement for property tax paid in 2011
- ❖ Closing Statement (HUD) for purchase or sale of a home
- ❖ W-2 for Wages
- ❖ W-2G for Gambling Winnings
- ❖ Last Pay Stub of the Year
- ❖ K-1's from Partnerships, Corporations or Estates
- ❖ If a Charitable Donation is over \$250 the taxpayer must obtain a letter from the charity showing that no goods or services were provided in return for the contribution. This MUST be obtained before the tax appointment.
- ❖ IRA Year-end Statements
- ❖ Voided check for Direct Deposit or Withdrawal
- ❖ All statements showing income
- ❖ If you have a Foreign bank account ending statement from the bank
- ❖ E mail address

If sending information via mail please download and fill in Client Information Sheet and sign the Client Consent Form.

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