

Checklist Pg 1	2024	2025	2026	2027	2028	2029
Tax Check List						
CHANGE OF ADDRESS OR PHONE #						
UPDATED DRIVERS LICENSE / REAL ID						
BANK ACCT INFO (confirm acct & Routing #) (if new provide acct # & routing #)						
SOCIAL SECURITY BENEFITS WORKSHEET						
W-2						
1099 R-RETIREMENT/PENSION						
1099 G						
1099 MISC						
1099 NEC						
MORTGAGE INTEREST - Form 1098						
REAL ESTATE TAXES						
HEALTH INSURANCE - Form 1095						
Form 1099 - INTEREST/DIVIDEND INCOME						
STOCK SALES - Form 1099B						
IRA INFO						
SETTLEMENT SHEETS						
BUSINESS EXPENSES						
TAX PAYMENTS (list how many & amount paid per voucher)						

8019 Old York Road
Elkins Park, PA 19027

RICHARD A. MILLER
Certified Public Account, PC

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Fax (215) 635-4678

Checklist Pg 2	2024	2025	2026	2027	2028	2029
DEPENDENT INFO						
CHILD CARE EXPENSES						
TUITION (1098 T)						
STUDENT LOAN - Form 1098E						
RENTAL INCOME/EXPENSES						
INTERNET RECEIPTS/OUT OF STATE PURCHASES YOU MADE BUT DID NOT PAY SALES TAX ON						
CRYPTO CURRENCY						

