MATTHEWS, CARTER AND BOYCE
TAX INFORMATION SHEET

PLEASE SEND/UPLOAD ALL OF THE FOLLOWING APPLICABLE INFORMATION TO US

Business Information, if applicable

1.) Have all records up to date through December 31, including a profit and loss statement.
2.) Purchase/finance agreements for any equipment/vehicles purchased during the year.
3.) Vehicle mileage for all vehicles used by the owners or employees, as follows:
    Vehicle one Total_________ Business__________ Other__________
    Vehicle two Total_________ Business__________ Other__________

Personal Information

1.) All W-2's and 1099 Forms, including 1099-K if received.
2.) List any other income that was received during the year, including rents, interest, dividends, commissions, stock sales, alimony, unemployment compensation, gambling winnings, etc. that was not reported on a 1099.
3.) All 1098 forms showing mortgage interest and real estate taxes paid. If a 1098 was not received, call the lending institution to get the amounts paid during the year for each loan.
4.) Any 1095 forms you received regarding your health insurance.
5.) Complete the list of personal deductions on the back of this sheet.
6.) Inform us of any vehicle purchase and send a copy of the purchase agreement.
7.) Provide all information related to any stock option activity that occurred during the year.
8.) Provide copies of all foreign bank/brokerage account statements at 12/31 if the total amount held in all foreign accounts combined exceeded $10,000 on any day during the year. Provide a list of all foreign assets/investments owned at 12/31, even if owned by an entity other than you individually.
9.) We also need to know if you received a distribution from or are a beneficiary of a foreign trust, or if you have a foreign life insurance policy with a cash surrender value or if you received any gifts from foreign sources.
10.) List the full name, social security number and birth dates for all new dependents this year. Inform us of any adoptions, divorces, marriages or deaths in the house.
11.) Partnership or S Corporation K-1's (if applicable) if we did not prepare it.
12.) If you refinanced, purchased or sold any real estate, including your personal residence, send the settlement sheet for the transaction. If the transaction was a sale, send the settlement sheet for the original purchase of the property as well.
13.) If any debts were canceled, provide all information plus any 1099-C's or 1099-A's received.
14.) Provide any information received for investment income earned by your children, including all 1099's received by them.
15.) If you want direct deposit of your refund, please attach a void check for the account.
16.) List all personal estimated income tax payments made for this tax year below. Please only list actual payments made, not the previous year overpayment.

	April		June		Sept		Jan	
	Federal	State	Federal	State	Federal	State	Federal	State
Date paid:								
Amount:								

PRELIMINARY CHECKLIST OF PERSONAL DEDUCTIONS

A. CONTRIBUTIONS

Church/Temple _________________

Other organizations _________________

Miles Traveled for Charity _________________

Value of Non Cash (clothing) donations _________________

B. INTEREST

Home mortgage _________________

Home equity _________________

Margin loans _________________

2nd home/Boat _________________

C. MEDICAL

Health insurance _________________

Doctors/Dentists _________________

Labs and clinics _________________

Vision, glasses, etc. _________________

Nursing/home health _________________

Long Term Care Ins. _________________

Prescriptions _________________

Other _________________

Medical Miles _________________

D. IRA/PENSION CONT.

IRA Cont.-Traditional _________________

IRA Cont.-Roth _________________

Pension Cont.-list type _________________

E. TAXES

Real Estate-home _________________

Real Estate-2nd home/vacation _________________

Personal property _________________

Other taxes-list type _________________

F. MISCELLANEOUS

Alimony paid _________________

Child care _________________

Health savings account contribution _________________

G. EDUCATION EXPENSES

College Tuition paid per individual _________________

____

College Savings plan per individual _________________

____

Student loan interest _________________