

Tax Returns Folder

Tax Preparer Name, Address, Phone number

Gift Tax Forms

Income Tax Return For Each of Last 5 Years

- i. Federal and State Returns
- ii. W2s and 1099s
- iii. Medical Expense
- iv. Home Real Estate Tax
- v. Incomes and Expenses of Rental properties
- vi. State Tax/Refund (N/A in WA)
- vii. Estimated Payments (past and present years)
- viii. Donations (in other words all supporting data)