

Tax Document

CHECK LIST**

- ___ W-2
- ___ W-2G
- ___ SOCIAL SECURITY (SSA-1099)
- ___ UNEMPLOYMENT
- ___ RETIREMENT PLAN DISTRIBUTION
- ___ INTEREST (1099-INT)
- ___ DIVIDENDS (1099-DIV)
- ___ STOCKS OR MUTUAL FUND SALE (1099-B)
- ___ SELF-EMPLOYMENT/MISCELLANEOUS
- ___ INCOME
- ___ EXPENSES FROM SELF-EMPLOYMENT
- ___ RENTAL PROPERTY
- ___ FARM INCOME/EXPENSES
- ___ OTHER _____

Client Signature

Three Birds Signature

**Please indicate # of each document dropped off