

CHECK LIST

(If you are married, you must include your spouse's information as well)

- _____ Please make sure you have included your contact information. You would be surprised at how many people forget to include it. I'll need an email address or a phone #.

- _____ ALL forms from www.jhltax.com needed to complete your return, personal info. Sheet, payment page (with your payment info), Power of Attorney, etc. Please double check to make sure you have filled everything out completely.

- _____ Copy of your passport, driver's license, and social security card

- _____ Voided check for direct deposit info. *** if you do not provide a voided check, you do not qualify for direct deposit. I will no longer accept it if it is written or emailed to me. You MUST include a voided check. If you forget, you can email a copy of your voided check or fax it to me @ 304-232-7984. NO ACCEPTIONS.***

- _____ W2's

- _____ Other income statements (1099-Misc (self employment), 1099-B (sale of stock), K1, brokerage & investment statements of any kind, gambling winnings, etc.

- _____ Rental income information and ALL receipts that coincide with the rental property. (if applicable)

- _____ Tour schedule(s) (Please list your start and end dates of each tour)

- _____ Copy of your last 2010 pay stub of the year (hotels are listed there)

- _____ ALL receipts for any expenses listed on your expense sheet. (If you do not have receipts, I WILL NOT take the deduction...NO ACCEPTIONS)

- _____ ALL employee contracts. If you had more than one employer and had to sign a contract, I will need ALL contracts for the time frame of 2009-2010 and 2010-2011.

If you have other information I haven't listed and you think I should know about it, please just make notes and I'll be in touch with any questions, I may have.

Thank you!!!
Ellen Jackson Blake