



**STARR**  
**Cochran**  
& ASSOCIATES

ENROLLED AGENT FOR TAX PREPARATION & AUDIT REPRESENTATION  
4400 EAST BROADWAY BOULEVARD, SUITE 600 TUCSON, ARIZONA 85711-3508 (520) 326-3937

### **TAX DATA SHEET**

If applicable to your tax situation, please bring the following information:

- W-2s from employers
- Miscellaneous income statements
- Year end interest and dividend statements
- Brokerage statements
- Social security, unemployment, pension or annuity statements
- Gambling income/loss statements
- If divorced this year: final papers indicating deduction for dependent children
- K-1(s) from partnership(s), S-corporation(s), LLC(s), trust(s)
- House purchase, sale or refinance: closing papers
- Day care statements

The following checklist of special categories could lead to helpful deductions. Please check the ones that apply and bring supporting information to your appointment.

- Were there any births, adoptions, marriages, divorces or deaths in your immediate family during the past year?
- Do you have anyone other than your children living with you?
- Do you contribute toward the support of persons other than those living with you?
- Do you pay or receive alimony?
- Did you have any gambling winnings? If so, do you have documentation of losses?
- Did you receive any distribution from an IRA, Roth IRA or retirement plan?
- Did you take any schooling related to your present job?
- Did you or a member of your family attend college this year? If so, please provide a list of expenses and tuition statement from the education institution.
- Do you expect a substantial change in your income next year?
- Did you receive a notice from IRS or AZ Department of Revenue regarding changes to a prior years' tax return? If so, please bring all correspondence.
- Did any of your dependent children receive unearned income such as interest or dividends?
- Are you making loan payments on a boat or recreational vehicle that has basic living accommodations such as sleeping space, toilet and cooking area?
- Did you make a contribution to a regular IRA or to a Roth IRA?