FROMM ACCOUNTING LLC

632 Fremont Street
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Dear Tax Client:

This correspondence is intended to help you gather tax information needed to prepare your 2016 personal income tax return. If you would like a detailed organizer which would include your 2015 information and spaces to enter your 2016 data, please call our office to have one sent to you.

The enclosed questionnaire asks about pertinent tax items necessary to prepare an accurate return. Please answer all applicable questions and attach a statement when necessary for additional information that is not asked for in the questionnaire.

ITEMS TO BRING TO YOUR TAX INTERVIEW OR SEND IN/DROP OFF:

- The completed, **signed** client questionnaire
- Forms W-2 for wages, salaries & tips
- All Forms 1099 for interest, dividends, unemployment, social security, rent, retirement pay, gambling winnings, miscellaneous income etc.
- Year-end brokerage statements showing investment transactions for stocks/bonds
- Schedule K-1 showing income from partnerships, S corporations, estates & trusts
- Statements supporting deductions for mortgage interest (Forms 1098) and taxes
- Closing statements related to any real estate sales or purchases in 2016
- Any tax notices sent to you by the IRS or other taxing authority in 2016
- A copy of your 2015 tax return, if not prepared by this office
- Copy of divorce decree, if granted in 2016
- Form 1098-T and a record of tuition payments, including those paid via loans. Please note that Form 1098-T shows amounts billed, not necessarily paid in 2016
- Form 1098-E showing student loan interest paid in 2016
- Amount of rent or property taxes paid in 2016
- Form 1095, if received, showing health insurance information. This is **mandatory** if you enrolled for health insurance through healthcare.gov, a/k/a the “exchange” or “marketplace.”

Thank you for the opportunity to be of service to you.

Sincerely,

Jeremy J Fromm

Jeremy J. Fromm, CPA
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