



Here's our short list of your documents we need to prepare your tax return:

- 1) Copies of your last year's federal, state, and local tax returns.
- 2) All of your IRS info. Forms W-2, 's 1099's, 1098 Mortgage Interest, Etc.
- 3) Copy of your last pay stub for the calendar year of this tax return.
- 4) List of all of your pilot deductions you are aware of...we'll go over a lot more during our telephone appointment or in-person meeting
- 5) Charitable Contributions, Medical Expenses, Misc. Deductions, Sales Tax on Major Items, Ad-Valorem Taxes, Reservist Expenses, Moving Expenses.
- 6) If you own a rental property, your list of income and expenses. We'll go over all the details and talk about deductions you may have missed.
- 7) If you purchased, sold, or refinanced a home, a copy of the HUD-1 RESPA closing statement for each real estate transaction.
- 8) If you sold any investments, the cost and date acquired for each one sold & form 1099-B.
- 9) Total the number of days you were away from home on overnight trips during the year. If you do international trips please list by country and city and the total number of days spent in each city.

Our Mailing and Contact info:

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Our posted hours during tax season:

Monday to Saturday 9am-5pm Eastern Standard Time

*We are often in earlier and sometimes later than "posted hours"
All in person and phone meetings are by appointment, but call or email anytime with questions.*