

## **Wagner & Associates Tax Solutions Inc**

### **Document Request**

**We need the following information from you. Please provide two complete copy(ies). Originals cannot be accepted. Please make two separate stack(s), tabbed and separated into categories. Thank you!**

- Proof of self-employment income for prior 3 (three) months (i.e. invoices, commissions, sales records, income statements).
- Proof of gross earnings and deductions for the last 3 (three) months from each employer (i.e. pay stubs, earning statements). If year-to-date information is available, send only on such statement as long as minimum of 3 (three) months is represented.
- Proof of pension/social security/other income for the last 3 (three) months from each payor, including any statements showing deductions. If year-to-date information is available, send only one such statement as long as a minimum of three months is represented.
- Current bank statement (checking, savings, money market, brokerage accounts and certificates of deposit) for all personal and business accounts. Please provide copies for the last 3 (three) months.
- A statement from life insurance companies that include type and cash/loan value amounts. If currently borrowed against, include loan amount.
- A current statement or letter from your lender showing the amount of your car payment and the current loan balance. Please provide payment information for all vehicles purchased and/or leased.
- A current mortgage statement or a letter from your lender showing the monthly payment amount(s) and the current loan balance for each piece of real estate that you own.
- A copy of your monthly statement or a letter from your lender showing the payment amount and current balance for each of your business assets.
- A copy of your last Form 1040, including all schedules.
- Verification of your current expenses (utilities, rent, insurance, property taxes, etc.) Please provide copies of expenses for the last 3 (three) months.
- Verification of your non-business transportation expenses. For example: car payments, lease payments, fuel, oil, insurance, parking, registration, etc. Please provide verification for the last 3 (three) months.
- Copies of your health care expenses, including health insurance premiums, disability insurance premiums, and other out-of-pocket expenses. Please provide copies for the last 3 (three) months.
- Copies of any court order requiring payment and proof of such payments (i.e. cancelled checks, money orders, earning statements showing deductions). Please provide copies for the last 3 (three) months.