

**PERSONAL INFORMATION**

\*Be sure to bring these with you no matter where you file.

- Last year's tax return
- Birth dates for you and every household members
- Social Security Numbers for you and household members

**US DOCUMENTS****KOREAN DOCUMENTS****FORMS**

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| <ul style="list-style-type: none"><li><input type="checkbox"/> All forms that say W-2, 1098, 1099, 1095 or (Schedule) K-1</li><li><input type="checkbox"/> Records for mortgage interest, real estate and personal property tax</li><li><input type="checkbox"/> Records for IRAs contributions or retire plans</li><li><input type="checkbox"/> Closing documents (such as HUD statement)</li></ul> | <ul style="list-style-type: none"><li><input type="checkbox"/> Certificate for Income Withholding Tax</li><li><input type="checkbox"/> Statement on Financial Income Tax Withholding (Interest &amp; Dividend)</li><li><input type="checkbox"/> Statement for a home you purchased or sold</li></ul> |
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**INCOME/ INVESTMENTS**

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| <ul style="list-style-type: none"><li><input type="checkbox"/> Income &amp; expense records for work you performed</li><li><input type="checkbox"/> Records of other income (rental, gambling, alimony, etc) and expenses, if applicable</li><li><input type="checkbox"/> Purchase date and your total investment in any stocks or other property you sold</li></ul> | <ul style="list-style-type: none"><li><input type="checkbox"/> Comprehensive income tax return</li><li><input type="checkbox"/> Balance sheet</li><li><input type="checkbox"/> Income statement</li><li><input type="checkbox"/> Depreciation statement</li><li><input type="checkbox"/> Stock transactions Statement</li></ul> |
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**OTHER RECORDS**

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| <ul style="list-style-type: none"><li><input type="checkbox"/> Charitable Donations</li><li><input type="checkbox"/> Child care expenses</li><li><input type="checkbox"/> Medical expenses</li></ul> | <ul style="list-style-type: none"><li><input type="checkbox"/> Any receipts relating to Medical or Child care expenses</li></ul> |
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