



Astron Financial Services Inc.

508 Green Road Suite 1 West Monroe, LA 71291

(318) 396-9600 Office (318) 396-9677 Fax

877-644-8099 Toll Free

astron@donfuller.ws (e-mail)

Personal Income Tax Checklist

We may need the following information to complete your taxes:

*All may not apply to everyone

- Copy of your drivers License
- Copy of Spouse's License
- Copy of your Social Security Card
- Copy of dependants & Spouse's Social Security Card
- Client Information sheet
- Current phone Numbers (work, home, & cell)
- Email Address (if available)
- Current Mailing Address
(if you lived there less than 2 yrs: give past 2 yrs. mailing address)
- W2's
- 1099's (R, G, INT, MISC.)
- 1098's (Interest Statements)
- Medical
(Hospital & Doctor bills, Drugs, Dental, Vision, Weight loss/gain, Rehab, special groceries, Sugar, AAA, etc.)
- Education Expenses
- Student Loan Interest
- Alimony (Paid or Received)
- Business/Farm Income
- Pension
- Unemployment
- Prizes & Scholarships
- Charity & Church donations
- Work Expenses
- Federal Tax Payments
- Child Care
- Rental Income

If you have any questions or comments, please do not hesitate to call.