



'OHANA KAI TAX

MOST IMPORTANT ITEMS TO UPLOAD

- W2's
- Property taxes paid
- Mortgage interest paid (all 1098 forms) **mortgages sometimes get bought out from other companies, refinances, etc.
- Social security number for everyone filing including dependents and newborns
- Car registration paid for all registrations paid
- Tuition
- Student loan interest paid
- Deduction sheets that apply to you, ask me for additional deductions if your career is not provided

New clients:

- Last year's tax return, at least provide how much state tax you received or paid from the prior year
- Checking account number and routing numbers for direct deposit of your refund