



SILVER CREEK FINANCIAL SERVICES, INC.
175 HWY 82
LOSTINE, OR 97857
(541) 569-2272
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This list will assist you in collecting and reporting information necessary for us to properly prepare your income tax return.

Please provide us with any of the following items you may have:

- A copy of your **previous two years' tax returns**, if they were not prepared by this office
- Form(s) W-2 (wages, etc.)
- Form(s) 1099 (interest, dividends, etc.)
- Brokerage statements from stock, bond or other investment transactions
- Schedule(s) K-1 (income/loss from partnerships, S corporations, etc.)
- Form(s) 1098 (mortgage interest) and/or 1098-T Tuition statements
- Property tax statements
- Closing statements pertaining to real estate transactions
- Income and expenses for businesses, farms, and/or rentals
- Any tax notices received from the IRS or State taxing authorities

Please feel free to contact us if you need further assistance.