

## Tax Gathering Checklist

### Information we typically ask for:

- A complete copy of your 2014 federal and state tax returns
- Anything you would normally take to your accountant to have your returns completed
  - W-2s
  - 1099s for investment and retirement income
  - 1098 showing mortgage interest and real estate taxes paid in that year
- Details of wages and non-cash benefits such as housing in Doha
- Bank statements showing the maximum balance for 2015 for each account held outside the United States

If there is anything you are unsure about, you can “ask a question” or post into the forum on the Sidra Resource Center.

Access the Sidra Resource Center using this URL [www.expatustax.com/sidra](http://www.expatustax.com/sidra)

Use the login and password information that has been emailed to you.