



**Required Documentation for Income Verification**

1040 - Complete Copy of Federal Income Tax Forms if filed including all schedules for past calendar year.
DP-10 - Complete Copy of State of NH Interest & Dividend Tax Form for past calendar year.
SSA-1099 - Social Security Benefit Statement for prior year. <i>A copy of your SSA-1099 form can be obtained from the Social Security Administration by calling 1-800-772-1213.</i>
1099-R - Distributions from Pensions, Annuities, Retirement or Profit-Sharing Plans, IRA's, Insurance Contracts, etc. for prior year.
W-2 / 1099 - All Wage statements for the prior year
1099-INT - All Interest Statements for prior year.
1099-DIV - All Dividend Statements for prior year.
Trust Income
VA Pension
Business or Self-Employment Income
Rental Income
Unemployment or Worker's Compensation
Alimony
Child/Dependent Support/Stipend
State of NH Health & Human Services Assistance letter documenting Food Stamps, APTD, or other assistance.
City Welfare
Fuel Assistance
<b>ANY OTHER INCOME NOT LISTED ABOVE</b>

**Required Documentation for Current Asset Verification**

Checking & Savings Monthly Statements for ALL accounts showing a minimum of 90 days of activity.
<i>Statements must be provided in their entirety and provided regardless of the current balance. Do not omit any pages. If you have closed a previously reported account, please provide last statement received.</i>
Documentation of Cash Value of ALL investments: Annuities, Mutual Funds, Shares, Stocks, Bonds, IRA's.
Documentation of Cash Value of Whole Life Insurance.
Vehicle registrations
Documentation of any loans on vehicles or real estate you own (except your primary residence).
Most recent tax bill on any real estate you own (except your primary residence).
Trust document if you are a Trustee or the Beneficiary of a Trust
<b>Evidence/documentation of any other assets not listed above.</b>

***This office reserves the right to request additional documentation as needed.***

***We recommend that you submit **COPIES** of the required documentation***

**The filing period begins when you have received your year-end income statements in January and ends April 15 prior to the setting of the tax rate.**