

303 Maxwell Ave
Springer, NM 87747
(575) 483-0027



146 N 3rd St
Raton, NM 87740
(575) 445-3657

www.oliverburtonnm.com
office@oliverburtonnm.com

Tax Return Document Checklist:

- ☐ **Previous Year Return**
- ☐ **Driver's License & Social Security Card**
- ☐ **Dependent Information (Social Security number, Date of Birth, Months living in the home)**
- ☐ **Bank Account Information if direct deposit refund/payment is desired.**
- ☐ **Current Year Tax Forms (W-2s, 1099s, K-1s, 1098s, etc....)**
- ☐ **If Self Employed: All Business Income & Expenses with supporting documentation.**
- ☐ **Prior Year Changes (Address, Occupation or Company, Marital Status, Change in Dependents, New Business, etc....)**
- ☐ **Current Contact Information including phone number, email, and mailing address if different from physical address.**