INDIVIDUAL TAX RETURN INFORMATION CHECKLIST – 2017

New Clients Basic Info

- Taxpayer, Spouse & Children's Names – Social Security Numbers & Birthdates
- Address & Phone Number (home, work or cell) & Email Address
- Copy of Previous Years Returns

Returning Clients Questions

- Did you recently move? If yes, we need your new address & closing statements.
- Did you change banks? If yes, please provide new account information.
- Did you add or lose any dependents this year? (Did you have a baby, or have a children graduate from college?)

INCOME

- ☐ W2s & 1099s or other income forms
- ☐ 1099 Interest Income – Bank Accounts
- ☐ 1099G Unemployment Compensation
- ☐ Social Security Statement(s)
- ☐ 1099R IRA Distributions – Regular or Roth
- ☐ 1099R Retirement Plan Distributions

STOCK/MUTUAL FUND STATEMENTS

- ☐ 1099DIV– Dividends & Interest on Stocks/Mutual Funds
- ☐ 1099B– Sale of Stocks Proceeds (Date purchased & original cost)

DEDUCTIONS

- ☐ Medical/Dental Expenses – Including Insurance Prem. & Long-term Care (must exceed 10% of AGI)
- ☐ Property Tax Statements
- ☐ Sales Tax on New Vehicles/Large Items (if more than State withholding)
- ☐ License Plate (s) – Renewal Fees
- ☐ Mortgage & Loc. Interest & Points of Refinancing
- ☐ Settlement Statement for New Home or Refinance
- ☐ Charity – Cash & Non-Cash
- ☐ Employee Business Expenses (Union Dues, Uniforms, Mileage, etc.)
- ☐ Tax Preparations Fees
- ☐ Broker Fees

HEALTH INSURANCE

- ☐ All Taxpayers Must Show Proof of Health Insurance & Provide a 1095A, 1095B or 1095C

CHILD CARE

- ☐ Providers Name, Address & Tax ID
- ☐ Daycare Paid

TUITION/STUDENT LOAN INTEREST

- ☐ 1098T Tuition Statement
- ☐ Education Expenses (Books, computer etc.)
- ☐ 1098E Student Loan Interest

RENTALS

- ☐ Closing Papers, if New Rental
- ☐ Income – Rent Received
- ☐ Mortgage Interest
- ☐ Home Owner's Insurance
- ☐ Repairs & Maintenance
- ☐ Utilities
- ☐ Association Dues
- ☐ Rental Mileage

K-1s From S Corporations and/or Partnerships