



2017 Tax Appointment Checklist

Please organize and bring to your tax appointment the following items, as they apply to your filing needs.

All Taxpayers:

- W2 (from each Employer)
- Driver's License or Picture ID - Everyone
- Social Security Cards - Taxpayer and dependents
- Proof Dependent Care
- Proof of Health Care:
 - Marketplace Premium Form 1095A
 - Other Group Insurance Form 1095B or 1095C
- Previous Years Returns (*new clients*)

Schedule A - Itemized Deduction Taxpayers:

- 1098 Mortgage Interest Statement
- House Taxes
- New House Settlement Statement
- Car Taxes
- Medical Expenses (*total must be at least 7.5% of income*)
- Charitable Contributions
- Miscellaneous Deductions
- Casualty or Theft Loss
- Gambling Income and Expenses
- Investment Income and Expenses

College Students or Dependent College Students

- 1098T - Tuition Statement
- Annual Student's Account Record (*Jan-Dec*)
- Receipts for Books and/or Required Supplies

Additional Income Documents

- 1099Miscellaneous - Independent/Contractor
- 1099 Div. - Dividends
- 1099R - Retirement
- 1099 Int. - Interest
- 1099G – Unemployment

Business (Schedule C)

- Secretary of State – Articles of Incorporation/Organization
- Business Description
- Tax ID number
- Income verification
- Payroll Expenses, Statements
- Expense Spreadsheet and/or Profit and Loss Statement
- Auto Data and expenses, if applicable
- Business Equipment (date of purchase, amount)

Ambassador's Business & Tax Services, Inc.
2104-A Ayrsley Town Blvd, Charlotte NC 28273
(704) 499-9054