2018 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 (if have purchased or refinanced a home)
- ☐ 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)

Business (Other Entities)

- ☐ Secretary of State – Articles of Incorporation or Organization
- ☐ Tax ID Number
- ☐ Trial Balance or Profit and Loss
- ☐ Balance Sheet
- ☐ List of Assets & Previous Depreciation
- ☐ Basis in Company
- ☐ K1 (if applicable)
- ☐ 1099 Lists and amounts filed and paid
- ☐ Payroll Reports
- ☐ Any 1099K or Income Verification

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