

Information

Checklist

**HOW WOULD YOU LIKE YOUR FINAL RETURN**?

* Pick Up
* Email\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Credit/Debit Card (MUST BE KEPT ON FILE)\*:**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Exp: \_\_\_\_\_\_\_\_ CVV:\_\_\_\_ Zip Code:\_\_\_\_\_**



**Name:**

:

:

|  |  |  |
| --- | --- | --- |
|  | **Address** |  |
|  | **Phone Number** |  |
|  | **Date of Birth** |  |
|  | **Occupation/ Profession** |  |
|  | **Change in Martial Status** |  |
|  | **Did you sell a property? Did you do a 1031 Exchange?** |  |
|  | **Do you have health Insurance through the Affordable Care Act? Did you receive a 1095A?** |  |
|  | **Did you receive any Unemployment?** |  |
|  | **Account & Routing Number? (Updated)** | **Acct #:**  **Routing#:** |
|  | **Monthly Rent** |  |
|  | **Children: Any new additions? /Childcare cost for the year** |  |
|  | **Did you withdraw any money from an IRA/401K?** |  |
|  | **Did anyone attend college in the last year?** |  |
|  | **Any 1099-Misc/ 1099-K income?** |  |
|  | **Have you recently retired?** |  |
|  | **Canceled Debt?** |  |
|  | **Do you collect Social Security?** |  |
|  | **Any gambling winnings?** |  |
|  | **Any out of pocket medical expenses?** |  |

**WHAT TO BRING TO YOUR TAX INTERVIEW**

 Wage Statements/ W-2

 Dependent’s Social Security numbers and dates of birth

 Last year’s tax returns

 Pension, retirement income/ 1099R

 IRA contributions & distributions/ 1099R

 Interest and dividend income/ 1099-INT/ 1099-DIV

 Mortgage or home equity loan interest paid/ 1098

 Real estate and personal property taxes

 Sales of stocks or bonds/ 1099-B

 Self-employed business income & expenses (commissions)/ 1099-MISC/ 1099-K

 Educational expenses/1099-E/1098-T/ 1099-Q  Child care expenses and provider information

 Lottery or gambling winnings & losses/ W-2G

 State refund amount/ 1099-G

 Social Security & Unemployment income/ SSA-1099/1099-G

 Income & expenses from rentals

 Income from partnerships, S Corporations, trusts & estates/ Schedule K-1

 Alimony paid or received

 Record of purchase or sale of residence

 Medical and dental expenses

 Estimated taxes, state, local & foreign taxes paid

 Cash and non-cash charitable donations

 Health Savings Account/ 1099-SA

 Non-reimbursed employment- related expenses (Not applicable for any year after 2017)

Affordable Care Act/ 1095A