Please use the following checklist to assist you in compiling information for your tax appointment. This is a comprehensive list; some items may not be applicable to you.

Personal Information

- ☐ Copy of last tax return filed
- ☐ 1095-A form for Health Insurance Carrier

Information about your income

- ☐ W-2 forms for you and your spouse
- ☐ 1099- G for unemployment income and/or state tax refunds
- ☐ 1099-MISC forms for you and your spouse
- ☐ 1099-R forms from IRAs or retirement plans
- ☐ 1099-S for income from sale of a property
- ☐ 1099-INT/DIV statements
- ☐ 1099-B for sale of stock, please included basis if not reported on form
- ☐ K-1 forms
- ☐ SSA-1099 for Social Security benefits received
- ☐ Alimony received
- ☐ If self-employed, we will need income and expenses
- ☐ Rental property income and expenses and prior year depreciation schedule
- ☐ Miscellaneous income
- ☐ W-2 G-Gambling Winnings
- ☐ 1099-C forms for cancellation of debt

Adjustments to your income

- ☐ Form 1098-E for student loan interest paid
- ☐ Form 1098-T for tuition paid
- ☐ Traditional IRA contributions made during the year
- ☐ Self-employed health insurance amount paid
- ☐ Alimony paid and social security number of recipient & last name

Deductions and credits

- ☐ Childcare costs: provider's name, address, tax ID number and amount paid for the year.
- ☐ Form 1098: Mortgage interest, private mortgage insurance (PMI), and points paid
- ☐ Real estate taxes paid
- ☐ Vehicle license fees
- ☐ Cash and non-cash donations
- ☐ Medical and dental expenses

Estimated tax you have paid

- ☐ Estimated tax payments during the year

Other Information

- ☐ Foreign bank account information: location, name of bank, account number, peak value of account during the year