Tax documentation and paperwork needed for your tax prep meeting

1) Copy of your prior year federal and state income tax returns ***(new clients only)***

2) Social security numbers and dates of birth for all family members which you will be claiming as dependents

3) All W-2 forms for 2017

4) 1099-Int forms for all bank and savings accounts which have interest earnings

5) 1099-Div forms for all brokerage accounts (this should show dividends and bond interest earnings)

6) Business owners and those who are self-employed please provide me with your 2017 total gross earnings and a detailed listing of all business expenses analyzed by expense category. Expense categories include, but are not limited to, Advertising, Telephone, Business miles driven, meals and entertainment expenses, Professional dues / subscriptions and organizations, Office supplies, Postage and delivery, Rent, Insurance costs, Commissions and/or fees, Internet access, Materials & Supplies, Licenses, Legal and Accounting costs, Contact Labor, Repairs & Maintenance, Business gifts, Health Insurance, business travel, security/alarm costs, computer purchases and supplies, utilities, taxes, continuing education etc.

7) Rental property owners should provide me with total 2017 gross rental income and rental expenses (real estate taxes, insurance, mortgage interest, utilities, repairs and maintenance, supplies, advertising, service contracts, permits, commissions/management etc.). If the property was either purchased or sold during 2017 please have the settlement statement available.

8) All 2017 pension/IRA distrib. (Forms 1099-R) and social security (1099-SSA) year end statements indicating both taxable and non-taxable benefits received

9) If you collected unemployment in 2017 make sure you provide me with the year end 1099-G Form

10) Tax forms confirming any 2017 gambling/lottery winnings (Form 1099-G). Any gambling losses apply, by only up to the extent of reportable winnings.

11) 2017 mortgage interest statements (Forms 1098) for all primary, secondary and home equity loans you had during the year.

12) 2017 real estate taxes paid (if you pay your real estate taxes thru mortgage escrow this amount should then be on the year-end mortgage statement -see #14 above)

13) If you refinanced, sold or purchased your house during 2017 provide me with a copy of the Settlement statement

14) Amount of 2017 student loan interest paid

15) Tuition paid for qualified higher education costs for you and any of your dependents. Providing Form 1098-T is necessary. If you can't find it please contact College/University

16) If you incurred child care expenses during 2017 I'll need the name and address of the day care provider, their Tax ID # and amount of child care payments

17) 2017 cash and non-cash charitable donations. The IRS requires that you have proper documentation in order to verify your donations.

18) 2017 medical expenses; including dental, eyecare, prescriptions, hospital, lab fees, long-term care insurance premiums, supplemental medical insurance premiums, co-payments, medical supplies etc.

19) Schedule of any unreimbursed employee business expenses, such as unreimbursed business mileage and tolls, union dues, Uniform exp, job education, investment expenses etc.

20) If you made 2017 quarterly federal and/or state estimated tax payments please list the amounts and dates of all quarterly estimated payments.

21) 2017 IRA contributions made (or intending to make) by the April 17, 2018 due date.

22) Any employment related moving expenses incurred during 2017

23) Any relevant Schedule K-1's from investments in Partnerships, LLC's or S-Corporations

24) If you are on Obama care we'll need the 1095-A form