2017 Information Checklist

This is a list of the most common items we'll need to finish your returns. We'll call you if we need anything else.
(You don't need to return this to us; unless you make notes we should be aware of.)

- ☐ Completed Client Questionnaire
- ☐ Signed Engagement Letter
- ☐ All return packets or mailing labels sent to you by the various taxing agencies
- ☐ All W-2's
- ☐ All 1099 forms received confirming income from interest, dividends, retirement, social security, disability, unemployment, gambling winnings, 1009K for business credit card receipts, etc.
- ☐ All income information for children if you want us to prepare their required returns
- ☐ Year-end statement of mortgage interest (Form 1098), escrow activity and balance on mortgage or home equity loans and real estate taxes paid
- ☐ Total of all **receipted** charitable contributions, and details for any non-cash contributions over $500
- ☐ Copies of all Trust, Partnership or S-Corporation K-l's *(send separately later if everything else is ready, <u>and let us know it's coming</u>)*
- ☐ If you bought, sold or refinanced real estate, then a closing statement, HUD, for each transaction
- ☐ If you sold any shares of mutual funds and basis information is not provided by the broker, detail all activity in the funds sold from original purchase date through date of sale date (year-end summary statements are ideal)
- ☐ If you are claiming auto mileage as a deduction- for business, rental properties or unreimbursed employee expenses, we need to know: total miles, commuting miles, and business miles driven for the year.
- ☐ If you lease your car or are deducting actual expenses, please also provide: original value of the car (what you could have bought it for) and date of lease, and all expenses for lease payments, gas, car washes, licenses, insurance, tires, repairs, etc.
- ☐ Copies of any federal, state or local tax correspondence during the year, including all payments made or refunds received.
- ☐ All legal documents for formation, sale or purchase of a business during the year All legal documents for divorce decrees.
- ☐ Voided check for account where refunds should be direct deposited (optional) Note: Joint refunds cannot be deposited into single owner accounts.
- ☐ If you purchased energy efficient products that may qualify for a tax credit, please provide a copy of the manufacturers certification statement and the purchase invoice.
- ☐ All 1095 forms related to your health insurance
- ☐ If you own a business or rental property please provide details on any repairs and or asset expenditures exceeding $2,500.

New Clients ONLY:

- ☐ Copies of prior federal, state and local returns and depreciation schedules if applicable (at least one year, preferably three)
- ☐ Copies of both parties' drivers' license