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Client: _____

- Please complete this checklist and mail, fax or email it to us.
- Please include documentation to properly support and explain items checked (✓) below, (e.g., W-2, K-1, 1098, 1099, list of educational expenses, home closing statement, etc.)
- Please attach any additional documentation needed to fully prepare your federal and state tax returns

CHECKLIST FOR 2017 TAX RETURN PREPARATION APPOINTMENT

Income	✓	Income	✓
Wages, salaries (Form W-2)		Rents received, rental expenses	
Business income and expenses		Miscellaneous income (Form 1099-Misc)	
Interest/Dividends received (Form 1099-DIV, 1099-INT)		Social Security Benefits received (Form SSA-1099, Form RRB-1099)	
Gain from sale of real estate (Form 1099-S)		Pension, annuity income (Form 1099-R)	
Gain/Loss from sale of stocks, bonds, etc. (Form 1099-B)		IRA/401K distributions (Form 1099-R and Form 5498)	
Income from partnerships, estates, trusts, S-corporations (Schedule K-1)		State/local income tax refunds/Unemployment compensation (Form 1099-G)	
Gambling winnings (Form W-2G)		Alimony received	
Deductions for Adjusted Gross Income (AGI)	✓	Deductions for Adjusted Gross Income (AGI)	✓
Alimony paid (Name and SSN of recipient)		Moving expenses	
Health Insurance paid by self-employed individual		Penalties on early withdrawal of savings (CDs)	
Health Savings Account (HSA) contributions (Form 5498SA & 1099-SA)		Student loan interest (limitations apply) (Form 1098-E)	
Educator expenses			
Itemized Deductions	✓	Itemized Deductions	✓
Charitable contributions		Dues*	
Medical expenses (to the extent they exceed 10% of AGI)		Employees business expenses (Auto, travel, etc)*	
Real estate taxes paid		Expenses to maintain investments (advisory fees)*	
Interest paid on home mortgages (Form 1098)		Special work clothes*	
State and local income taxes paid		Home office deductions*	
Gambling losses (not in excess of gambling winnings)		Professional subscriptions*	
Car License registration fees paid		Tax Preparation fees*	
*These expenses are deductible to the extent they, in aggregate, exceed 2% of your AGI			
Expenses	✓	Expenses	✓
Child and dependent care expenses		Adoption expenses	
Rent for your personal residence		Estimated tax payments made during the year (dates and amounts paid)	
Energy efficient improvements made in your home		Education expenses (1098-T)	
Miscellaneous	✓	Miscellaneous	✓
Foreclosure, or cancellation of debt		Health insurance for everyone being claimed on the tax return	
Bank account/s in foreign countries		Purchase a home	
Balance/s greater than \$10000 in any foreign bank account/s		Contributions to IRA, 401(K)	
Direct deposit of your refund (provide bank routing and account numbers)		Direct debit of your balance due (provide bank routing and account numbers)	
Driver's License details (For Taxpayer and Spouse): State, Number, Date of issue and Expiration date			