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We will start work on your return *only* when we have received this completed form.

Tax Year 2018 Client Checklist

Name(s): _____

Please complete the following checklist as it pertains to You, Your Spouse, and Your Dependents for 2018.

| Dependents and Filing Status | | YES | NO | Comment |
|------------------------------|---|-----|----|---------|
| 1 | Did your address change during the year? | | | |
| 2 | Did your marital status change during the year? | | | |
| 3 | Were there any changes in dependents? <i>Please provide SSN for new child</i> | | | |
| 4 | Are you supporting anyone not living with you? | | | |
| 5 | Are you separated or divorced with child(ren)? <i>We may require Form 8332</i> | | | |
| Income | | YES | NO | Comment |
| 6 | Did you change employment in 2018? | | | |
| 7 | Did you have self-employment income (or loss)? <i>Include Lyft, Uber, Etsy, etc.</i> | | | |
| 8 | Did you start a business, purchase a rental property or farm, or acquire interest in an S corporation or partnership? | | | |
| 9 | Did you receive any disability or unemployment payments? | | | |
| 10 | Did you receive or pay alimony? | | | |
| 11 | Did you maintain a foreign bank or investment account <i>at any time</i> in 2018? | | | |
| | If so, did you receive any foreign income, including interest? <i>Excludes U.S. mutual funds</i> | | | |
| 12 | Did you receive ANY interest or dividend income? <i>No amount is too small!</i> | | | |
| 13 | Did you buy/sell any stocks, bonds, or other investment property? | | | |
| 14 | Did you acquire or sell any employer-based stock or options [RSUs, ISOs, ESPPs, etc.]? | | | |
| | Do you have stock acquired from ISOs exercised from a prior year? | | | |
| 15 | Did a lender cancel or forgive any of your debt? | | | |
| 16 | Did you make any withdrawals from an education savings account or 529 plan? | | | |
| 17 | Do you or did you own a second residence or other real estate or land? | | | |
| | Did you sell any real estate (personal, investment, or business use)? | | | |
| | Did you receive ANY rental income? <i>This could include Airbnb, VRBO, etc.</i> | | | |
| Adjustments to Income | | YES | NO | Comment |
| 18 | Did you have any higher education expenses? | | | |
| 19 | Did you pay any student loan interest? | | | |
| 20 | Did you make any contributions to or receive any distributions from a Health Savings Account (HSA)? <i>Form 1099-SA required when distributions were made</i> | | | |
| 21 | Did you purchase a motor vehicle or boat? | | | |

| Adjustments to Income (continued) | | YES | NO | Comment |
|--|--|------------|-----------|----------------|
| 22 | Did you pay out-of-pocket medical expenses that might qualify to meet the deduction threshold (7 1/2% of your income)? <i>Include long-term care premiums if applicable.</i> | | | |
| 23 | * Did you purchase, sell, or refinance your principal home or second home? | | | |
| | * Do you have a home equity loan or line of credit? | | | |
| 24 | Did you build, or make capital improvements to, your primary residence? | | | |
| 25 | Did you make any charitable contributions? <i>Note substantiation requirements for donations of \$250 or more.</i> | | | |
| 26 | Are you self-employed and use an area of your home regularly & exclusively for business purposes? | | | |
| 27 | If self-employed, do you have records for all business-related expenses, including travel and/or mileage? | | | |
| 28 | Are you self-employed and use your car for business purposes? | | | |
| | If so, are you paying interest on a car loan? | | | |
| 29 | Do you have any medical or charity mileage? | | | |
| Retirement | | YES | NO | Comment |
| 30 | Did you or your spouse reach age 70 1/2 in 2018? | | | |
| 31 | Did anyone in the family receive Social Security benefits? | | | |
| 32 | Did you receive a distribution from a retirement plan [401(k), IRA, SEP, etc.]? | | | |
| | Did you make a Qualified Charitable Distribution from your IRA? | | | |
| 33 | Did you convert part or all of your traditional IRA/SEP/SIMPLE IRA into a Roth IRA in 2018? | | | |
| | Do you have IRAs with any non-deductible contributions (i.e. 'basis') ? | | | |
| 34 | Have you contributed (or plan on contributing) to <u>any</u> IRA, SEP, Keogh, Roth, or SIMPLE plan for the tax year 2018? <i>Please indicate type & amount.</i> | | | |
| Miscellaneous | | YES | NO | Comment |
| 35 | Did you receive any notifications from the Internal Revenue Service or any state taxing agency? | | | |
| 36 | Did you make any estimated federal or state tax payments? <i>Provide dates & amounts</i> | | | |
| 37 | Were you a resident of (or did you have income in) more than one state? | | | |
| 38 | Did you pay anyone for domestic services in your home [nanny, housekeeper, gardener, etc.]? <i>Please provide records of any taxes paid or estimated taxes paid on these wages. Who is preparing Form W-2?</i> | | | |
| 39 | Did you incur any day care costs for your dependents? | | | |
| 40 | Did you give a gift of more than \$15,000 to one or more people (including college savings 529 plan contributions)? | | | |
| 41 | Do you think you qualify for any energy-related credits (e.g. solar panels, electric car, home energy improvements)? | | | |
| 42 | Did anyone in the family NOT maintain health insurance for the entire year? | | | |
| 43 | Did you: Have gambling winnings? Surrender any US savings bonds? Have any tip income not reported to your employer? Have any worthless securities or uncollectible bad debts? Adopt a child or begin the adoption process? Experience a disaster/casualty loss in a Presidentially-declared disaster area? | | | |

* The Tax Cuts and Jobs Act now requires more detail about how you use proceeds from mortgages and home equity loans

_____ Date: _____
 Print & Sign Taxpayer Name

_____ Date: _____
 Print & Sign Spouse Name (if applicable)