To prepare for your tax appointment, please review the following checklist and BRING ALL required documents to your appointment.

Health Care Coverage

- ☐ If you have health insurance coverage through your employer(s), bring **FORM 1095-B or C**. Your tax return CANNOT be completed without this form.
- ☐ If you, your spouse and your dependents obtained health care coverage from any type of Federal or State sponsored health insurance marketplace at any time during the year, bring **FORM 1095-A**. Your tax return CANNOT be completed without this form.
- ☐ If you, your spouse and your dependents received an exemption for health care coverage, bring that **exemption certificate**.

2018 Income Information

- ☐ **W-2 FORM(s)** – For you and your spouse from all employers and the last two 2018 paycheck stubs
- ☐ **1099 FORM(s)** – For interest, dividends, rents, royalties, non-employee compensation or other income
- ☐ **Rental Property** – Income, list of all expenses and purchases, and miles driven to manage the property
- ☐ **Businesses** – Profit/Loss statement, capital equipment purchases, home business expenses, square footage of entire home and square footage of office space only, home operational expenses, FORM 1099-K, vehicle expenses and business and total annual mileage on vehicle
- ☐ **1099-R FORM(s)** – Distributions and rollovers from pensions, retirement plans, 401(k) and 403(b) plans, IRA, Roth IRA, deferred compensation plans, retirement plan Roth conversions, annuities, insurance policies and defaulted retirement plan loans
- ☐ **Sale or Exchange of Assets** – Real estate, securities, business assets, collectables, personal property
- ☐ **1099-B FORM(s)** – Sale or exchange of stocks, bonds, mutual funds or any type of investment security. Include: date of purchase and cost of each regardless of gain or loss (brokerage statements may provide this information)
- ☐ **SSA-1099 FORM(s)** – For Social Security benefits
- ☐ **1099-C and 1099-A FORM(s)** – Loan Modifications, Foreclosure, Short Sale, Debt Cancellations, Debt or Loans Forgiven or Discounted, *please call our office immediately for guidance*
- ☐ **1099-G FORM(s)** – For unemployment benefits or state tax refunds
- ☐ **1099-S FORM(s)** – From the sale or exchange of real estate
- ☐ **K-1 FORM(s)** – Partnerships, LLC's, Investments, S-Corporations, Trusts, Estates (please bring all pages)
- ☐ **W2-G FORM(s)** – Gambling winnings (regardless of losses)
- ☐ **1099-Q FORM(s)** – Payments from qualified education programs, 529 Plans, CollegeInvest
- ☐ **1099-SA FORM(s)** – Distributions from Health Savings Accounts (HSA, MSA, Medicare Advantage Plans)
- ☐ **Miscellaneous Income** – Jury duty, prizes, awards, legal settlements, scholarships, fellowships, etc.
- ☐ **Alimony** – received

Deduction & Credits

- ☐ **1098 Mortgage Interest FORM(s)** – Mortgage interest paid on ALL real estate
- ☐ **Interest Paid** – (finance charges) for recreational vehicles that have a kitchen, sleeping area and toilet.
- ☐ **Charitable Donations** – Official charity receipts, miles driven, out-of pocket expenses for volunteering
- ☐ **Education Expenses (FORM 1098-T is Mandatory)** – For all family members, tuition, books, fees (computers, supplies, etc.)
- ☐ **Child Care Costs** – Provider's name, address, tax ID number, and amount paid for each child and each provider

Deduction & Credits *(continued)*

- ☐ **Employee Business Expenses** – These expenses are no longer deductible
- ☐ **Final Closing Escrow Statement** – From sale, purchase or refinance of your home or any real estate
- ☐ **Tax and Financial Planning Fees** – These expenses are no longer deductible
- ☐ **Medical and Dental Expenses** – *Only deductible if total expenses exceed 7.5% of your gross income.* These expenses include insurance premiums paid, payments to doctors, dentists, hospitals, prescriptions and laboratory. If self-employed health/dental/long term care insurance premiums paid may be deductible
- ☐ **Casualty and Theft Losses** – Deductible only if in Federally declared disaster area. Amount of damage, insurance or other reimbursement if applicable, police report if applicable
- ☐ **Adoption Expenses** – Social Security number of child, record of legal, medical and transportation costs
- ☐ **Gambling Losses** – Only if you have gambling winnings
- ☐ **Solar System Purchased** – Amount paid, date placed in service, copy of the contract
- ☐ **Energy Efficient Home Improvements** – These expenses are no longer deductible

Adjustments to Income

- ☐ **Retirement Contributions** – Contributions to any type of IRA, Roth IRA, SEP IRA, Simple IRA, or self-employed retirement plans made during the year or planned to be before April 15, 2019 that will be applied for tax year 2018
- ☐ **Insurance Premiums Paid** – **Self-Employed** Health, Dental and Long Term Care insurance premium payments paid**.** Bring year end pension stub showing ALL insurance premiums deducted from your pension
- ☐ **Student Loans 1098-E FORMS** – Student loan interest paid
- ☐ **Alimony Paid** – Amount, recipient information (including social security number), divorce settlement
- ☐ **Health Savings Account (HSA) Contributions** – Bring FORM(s) 5498-SA
- ☐ **Moving Expenses** – These expenses are no longer deductible unless it is related to being in the military
- ☐ **Early Withdrawal Penalties** – FORM(s) 1099-INT

Taxes Paid

- ☐ **Real Estate Property Taxes** – Paid for all properties, bring BOTH tax bills for 2017/2018 and 2018/2019
- ☐ **DMV** – Bring original or copy—**front & back—**of vehicle registration forms paid in 2018
- ☐ **Sales Tax** – Paid on any vehicles or any recreational vehicles purchased in 2018. Bring the sales contracts.
- ☐ **Estimated Tax Payments** – Dates and amounts paid to Federal & State (please bring verification)
- ☐ **Prior Year Tax Refund** – If applied to your 2018 taxes and/or any estimated taxes paid with an extension to file
- ☐ **Foreign Taxes Paid** – Amount, type and date paid

Other Required Information

- ☐ **Social Security Card** – Bring a copy of the Social Security card for each **NEW** dependent and for dependent(s) born in 2018
- ☐ **Driver's License(s)** – Bring a copy of the Driver's License for all taxpayers.
- ☐ **Foreign Bank Account Information** – Location, name of institutions, account number, peak value of account during the year. Please call our office for guidance if you have any foreign accounts, foreign businesses, foreign trusts or any online or internet-based gambling accounts.