



Tax Appointment Checklist

Folks find themselves in new situations each year. Here is a list of situations folks experience in a year, to help you prepare for your appointment.

Event	Bring to appointment
<input type="checkbox"/> For everyone	Complete Discussion Points questionnaire (part of Tax Organizer) and bring your identification such as a driver's license
<input type="checkbox"/> Marriage	Prior year return for both spouses
<input type="checkbox"/> Divorce	Copy of divorce decree
<input type="checkbox"/> Birth or Adoption	Social Security Card, date of birth and adoption papers, if applicable
<input type="checkbox"/> Death of child or spouse	Date of death
<input type="checkbox"/> New household members	Date of occupancy, Social Security Card, date of birth and relationship
<input type="checkbox"/> Unemployment	Form 1099-G showing unemployment compensation
<input type="checkbox"/> Retirement contribution	Type of plan and amount contributed
<input type="checkbox"/> Retirement distribution	Form 1099-R
<input type="checkbox"/> Social Security Benefits	Form 1099-SSA
<input type="checkbox"/> Sale of stock/bonds, etc	Form 1099-B or other sale documents as well as amount paid for security sold
<input type="checkbox"/> Investment income	Form 1099-INT for interest income, Form 1099-DIV for dividend income
<input type="checkbox"/> Buy/sell of residence	Settlement statement from closing of purchase or sale; for a sale bring the purchase information as well
<input type="checkbox"/> Inheritance	K-1 from the estate, please call us to discuss
<input type="checkbox"/> Rental Property	Income, expenses, new property purchased
<input type="checkbox"/> Prizes	Form 1099-MISC; value of prizes not included on 1099-MISC
<input type="checkbox"/> Lottery/gambling	Total amount won whether on W-2Gs or not; total amount of losses
<input type="checkbox"/> Health Savings Accounts	Provide 1099-SA showing distributions and Form 5498-SA for contributions
<input type="checkbox"/> Health related costs	Retired: Health insurance, other medical, dental, and drug expenses Self-Employed: Health insurance (health, dental, long-term care) Anyone: Costs of medical, dental and drug expenses if over 10% of income
<input type="checkbox"/> Proof of health insurance	Provide form 1095. If you're covered through the exchange, we will require Form 1095-A to reconcile the insurance subsidy
<input type="checkbox"/> Taxes paid deduction	Prior year's income tax return; property tax bills; letter from the state regarding any change in a prior filed return
<input type="checkbox"/> Home deductions	Form 1098 for mortgage interest
<input type="checkbox"/> Charitable donations	Cash: List of donations by date; gets receipts for donations over \$250 Non-Cash: Use non-cash donation guide above Volunteer expenses: Mileage
<input type="checkbox"/> Job-related expenses	Mileage log, travel, or miscellaneous expense amounts for items related to employment

- Tuition credits Form 1098-T
- Student loan interest Form 1098-E
- Dependent care credit Receipt from the day care provider containing their name, address, tax ID number and amount paid
- Lawsuit settlements Date received; reason for the settlement; Form 1099-MISC