

A GENERAL LIST OF ITEMS TO BRING

PLEASE BRING ALL OF THE INFORMATION THAT APPLIES TO YOU:

Contact Information:

- Updated address, phone number, and email address
- Bank account routing and account numbers for direct deposit
- Names and social security numbers of any new dependents

NEW CLIENTS: Bring a copy of last year's tax return

Employment, Retirement, Investments and Other Income:

- W2s or 1099s for each job and/or 1099 for Unemployment compensation from the Department of Workforce Services
- 1099R (Retirement distribution forms) and/or SSA-1099 (Social Security Benefits Received)
- 5498 (Retirement contribution and value) from investment broker
- K-1 Forms
- 1099-INT from Credit Unions and Bank accounts
- 1099 from Investment Brokerage, such as Wells Fargo or Merrill Lynch (Cost basis on stock sales, if not disclosed on 1099)
- Alimony received and/or gambling winnings

Business or Farm:

- QuickBooks backup along with the password
- Gross Revenue
- Expenses categorized by type (office supplies, advertising, training, etc)
- Miles driven (both business and personal)
- Cost, description, and date of purchase of any new assets, such as equipment, furniture, vehicles
- Business use of home: a. If home is your only office, provide square feet of office and square feet of house
b. Provide cost of annual utilities, insurance, rent, repairs
- Health insurance premiums paid not through an employer provided plan

Rentals:

- Rental income per rental unit
- Expenses categorized by type (insurance, repairs, taxes, interest, etc)
- Cost, description, and date of purchase of any new rentals or improvements

Deductions:

- Health Savings Account contributions, if not through an employer provided plan
- Moving expenses, if you moved more than 100 miles
- Alimony paid along with name and SSN of recipient
- Property taxes paid
- Sales tax paid on major purchases, such as vehicles, RVs, boats, etc.
- Mortgage interest paid, form 1098
- Closing statements on new purchases or refinance of existing mortgage
- Donations listed by charity and amount
- Unreimbursed employee expenses

Education:

- Student loan interest paid
- 1099-T from an educational institution on higher education
- Amount actually paid to the college or university for tuition and books. Will not necessarily coincide with 1099-T received

Health Care:

- If you received insurance through the Marketplace: Form 1095-A provided by Health Insurance Provider
- If you are insured through your employer: Form 1095-C issued by large employers (over 50 employees) and/or Form 1095-B from the insurance companies
- Inform us if any individuals in the household were not insured during the year

Credits:

- Day Care: Provide name, social security number, address and amount paid to each day care provider
- Documentation on any new residential energy credits such as solar panels, exterior windows or doors, or insulation

***Did you make estimated payments?
We need those amounts!**

***Don't forget!
Bring all correspondence received
from the IRS.**

NEED MORE HELP?

We have several worksheets to help ensure you haven't overlooked anything. Please call our office for a personalized tax organizer or visit childrichards.com for different business organizers, tips and other useful information.