A GENERAL LIST OF ITEMS TO BRING

PLEASE BRING ALL OF THE INFORMATION THAT APPLIES TO YOU

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

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
  (For 2018 you will need to bring verification with you such as a Social Security Card or insurance record)

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 accounts (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:

- ☐ Form 5498 Health Savings Account contributions, if not through an employer provided plan
- ☐ Alimony paid along with name and SSN of recipient
- ☐ Property taxes paid
- ☐ Sales tax paid on major purchases, such as vehicles, RVs, boats, etc.
- ☐ Form 1098 Mortgage interest paid
- ☐ Closing statements on new purchases or refinance of existing mortgage
- ☐ Donations listed by charity and amount

Education:

- ☐ Student loan interest paid
- ☐ 1099-T from an educational institution for post high school
- ☐ Amount actually paid to the college or university for tuition and books. (Will not necessarily coincide with 1099-T received)

Health Care:

- ☐ 1099-SA Health Savings Account distribution forms
- ☐ 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
- ☐ 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, insulation or electric vehicles

***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.