

2017 Tax Document Short Checklist

- ___ Social Security numbers and birthdates for everyone included on your return (spouse, children, parents, etc)
- ___ Copies of Drivers licenses or other form of ID.
- ___ Last year's tax return and amount paid for preparing the tax return (only if we did not prepare your 2016 tax return)
- ___ Amount of estimated income tax payments paid for 2017 (both Federal and State) and the dates paid
- ___ All forms that say W-2, 1098, 1099, or (Schedule) K-1
- ___ All forms 1095 and/or documentation of health care coverage through the entire year.
- ___ Records of other income (rental, jury duty, gambling, hobby, alimony, state or local income tax refunds, etc.) and expenses, if applicable
- ___ Income and expense records for work you performed (not already shown on a W-2 or 1099). All expenditures including mileage must be properly documented.
- ___ Purchase date and original cost of any stocks or other property you sold during this year
- ___ Records of any contributions you made to IRAs or other retirement plans
- ___ Records for mortgage interest, real estate and personal property taxes paid
- ___ Amounts donated to houses of worship, schools and other charitable organizations, including receipts.
- ___ Receipts for any non-cash charitable donations and documentation of values and listing of items.
- ___ Amount paid for health insurance and to doctors, dentists, hospitals, etc.
- ___ Records to support childcare (name, phone number, and SSN or EIN) and higher education costs (tuition or student loan interest)
- ___ Non-reimbursed employment-related expenses (union dues, travel, mileage, publications, tools, uniform cost and cleaning, etc.) All mileage must be documented properly.
- ___ Job search expenses and unemployment income (if applicable)