

2018 Tax Preparation Checklist

Name: _____

Daytime Tel. #: _____

This checklist is provided as a guide to help ensure that you have all of the necessary documentation for your taxes to be prepared. Please do not fill amounts in on this form. Provide the required documentation for preparation of tax return.

Check

***	Change in number of dependents (adding or removing)? If adding, please provide SS#, birth date & relationship for each on the enclosed Data Verification Worksheet. If a dependent or taxpayer passed away in 2018, please provide an original death certificate.	
1	W2's from all employers	
2	ALL 1099 forms (such as MISC, HSA, C, B, INT, G, DIV, H, K)	
3	ALL Affordable Care Act 1095 forms (A, B and/or C) (VERY IMPORTANT!)	
4	All dividend and interest statements (See #2 above)	
5	Pension statements (1099R); Social Security or Tier 1 Railroad Retirement statements	
6	Distribution of IRAs, regardless of age (please indicate if your distribution was used for education, medical bills or purchase of a first home if you are under 59-1/2)	
7	Unemployment compensation statements	
8	Alimony, Paid or Received (child support is neither deductible nor considered income) Documentation of alimony separate from child support must be provided.	
9	Self employment - all income and expense information	
10	Portion of home used exclusively for business - provide square footage of business area as well as total square footage of house. (Incurs an additional schedule, and therefore a higher prep fee.)	
11	Cost of equipment purchases for business	
12	Operation of a farm - all income and expense information	
13	Rental property - all income and expense information	
14	Gambling winnings; royalties	
15	Any miscellaneous income (prizes, jury duty, etc.)	
16	Partnership information (Form K1)	
17	State and/or local refund statement from 2017 taxes (if you itemized on federal return)	
18	Sale or purchase of a home - settlement sheets	
19	Refinance of existing mortgage - settlement sheets	
20	Mortgage interest statements (1st, 2nd, 3rd, etc.) Form 1098 or other (includes interest on loans for self-contained travel trailers, motor homes, etc.)	
21	Real estate tax statements	
22	Sale of any other property besides primary residence (settlement sheets, original cost)	
23	Sale of stock (must have purchase price , date of purchase, sale price, date of sale)	
24	Medical expenses, including cost of health insurance, prescriptions, doctor visits, etc.	
25	Contributions (must have receipts in your possession for contributions to be deducted)	
26	Contributions to: IRA, SEP, Keogh, Roth or Simple Retirement plan	
27	Education expenses - actual amounts paid	
28	Tuition and/or Student Loan Interest statements for anyone listed on your tax return.	
29	Child care or dependent care expenses (not preschool)	
30	Any large purchases (car, motor home, boat, aircraft, etc.) - Bring receipt showing sales tax paid.	
31	Use of personal vehicle for business, medical or charitable miles (unreimbursed mileage - must provide written mileage log)	
32	Any purchases made as a condition of employment (uniforms, steel-toe shoes, boots, special gloves, union dues, training, etc.) - counts only for PA return!	
33	Adoption expenses (Regular or special-needs)	
34	Any post-secondary education paid for with EE or I savings bonds.	
35	Date(s) and amount(s) of quarterly taxes paid during 2018 (not shown on W2)	
36	Has your name changed? - Have you changed your name with the Social Security Administration? (Taxes must be filed in name as it appears on SS card.)	

2017 Tax Preparation Checklist

37	Short sale of residence or mortgage foreclosure of residence	
38	Cancellation of debt (Form 1098-C)	
39	Gifts (cash or otherwise) made during 2018 in excess of \$14,000 per recipient	
40	Car mileage for charitable purposes (need written proof, i.e. daily log)	
41	Car mileage for medical purposes (need written proof, i.e. daily log)	
42	Religious Exemption from Social Security and Medicare taxes (Form 4029)	

PLEASE NOTE: If you have multiple receipts for any purpose (prescriptions, medical visits, business expenses, etc.), **please provide a total of the receipts, broken down by expense type.**

We do not need the actual receipts and the copying & scanning of multiple receipts will increase the cost of your tax return.

You must have the receipts in your possession should you be selected for an audit.

Please use this area for notes, questions, etc.: