



INCOME TAX PREPARATION CHECKLIST

In 2016, did you (or your spouse) receive income from any of the following:

- Wages – **W2(s)**
- Interest or Dividends – **1099 Div or Int**
- Retirement or IRA Distribution – **1099 R**
- Partnership or S-Corporation – **K1(s)**
- Unemployment – **1099 G**
- State Income Tax Refund
- Alimony
- Social Security Benefits – **1099 SSA**
- Operating a Business or Farm /Self Employment
- Own or receive income from rental property
- Have gambling winnings and losses
- Royalties – **K1(s) or 1099 Misc**
- Any Other Income – **1099 Misc**

In 2016, did you (or your spouse) sell or dispose of any:

- Stocks, Mutual Funds or Bonds – **1099 B**
- Personal Residence – **HUD Closing Statement**
- Rental Property or Other Personal Property
If so are you receiving installments payments?

In 2016, did you (or your spouse):

- Contribute to an IRA, SEP, or Keogh Plan
- Have a foreign bank or securities account
- Pay interest on student loans
- Pay for post secondary education – **1098 T**
- Have a home mortgage, a second mortgage or a home equity loan – **1098**
- Pay real estate taxes – **Tax Statement or 1098**
- Pay medical expenses and/or private health or Long Term Care insurance premiums
- Make contributions to a charity or church
\$499+ in non-cash items must be documented
- Suffer a casualty loss
- Have out-of-pocket job expenses
- Incur Job Hunting expenses
- Pay alimony
- Pay child or dependent care expenses
- Send payments to IRS for 2016 taxes
- Cash in a Life Insurance Policy or Annuity
- Receive any letters or notices from the IRS

NEW IRS REQUIRMENTS

You **must** have documentation proving that the child(ren) listed on your Tax Return resided with you in 2016 order to claim EIC, Child Tax Credit and America Opportunity Tax Credit. Acceptable documents include:

- School Records or Statement
- Landlord or property Management Statement
- Health Care Provider Statement
- Medical Records
- Child Care provider records
- Placement agency statement
- Social services records or statement

Things to keep in mind:

If you had health insurance you will have a 1095A, 1095B or 1095C.

Did you buy or refinance a personal residence in 2016? (HUD Closing Statement)

Social Security number and date of birth are required for all individuals listed on your tax return. (New clients need to bring Social Security Cards to appointment)

You have until 4/18/17 to establish 2016 IRAs (Traditional, Roth, SEP and Educational).

Make Your Appointment NOW:

Online or Call

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