



Name _____

Information Checklist

HOW WOULD YOU LIKE YOUR FINAL RETURN?

- Pickup
- Email
- Smart Vault



EMAIL: _____

Address (RECENTLY UPDATED?)	
Did you sell a property? Did you do a 1031 Exchange?	
Do you have health Insurance through the Affordable Care Act? Did you receive a 1095A?	
Phone Number	
Date of Birth	
Profession / Job Occupation	
Change in Account & Routing Number?	
Change in marital status?	
Monthly Rent	
Children: Any new additions? /Childcare cost for the year	
Did you withdraw any money from an IRA/401K?	
Did anyone attend college in the last year?	
Any 1099-Misc/ 1099-K income?	
Have you recently retired?	
Canceled Debt?	
Do you collect Social Security?	
Any gambling winnings?	
Any out of pocket medical expenses?	

WHAT TO BRING TO YOUR TAX INTERVIEW

- Wage Statements/ W-2
- Dependent's Social Security numbers and dates of birth
- Last year's tax returns
- Pension, retirement income/ 1099R
- IRA contributions & distributions/ 1099R
- Interest and dividend income/ 1099-INT/ 1099-DIV
- Mortgage or home equity loan interest paid/ 1098
- Real estate and personal property taxes
- Sales of stocks or bonds/ 1099-B
- Self-employed business income & expenses (commissions)/ 1099-MISC/
1099-K
- Educational expenses/1099-E/1098-T/ 1099-Q
- Child care expenses and provider information
- Lottery or gambling winnings & losses/ W-2G
- State refund amount/ 1099-G
- Social Security & Unemployment income/ SSA-1099/1099-G
- Income & expenses from rentals
- Income from partnerships, S Corporations, trusts & estates/ Schedule K-1
- Alimony paid or received
- Record of purchase or sale of residence
- Medical and dental expenses
- Estimated taxes, state, local & foreign taxes paid
- Cash and non-cash charitable donations
- Health Savings Account/ 1099-SA
- Non-reimbursed employment- related expenses (Not applicable for any
year after 2017)
- Affordable Care Act/ 1095A