

2017 tax year

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Items to bring to your tax appointment:

- Last 3-4 years of tax returns
- Signed “Client Information Form”
- Signed “Engagement Agreement”
- Social Security Cards for all on tax return
- Proof of residency if you are claiming children (school or medical documents)
- Form 8332 or statement releasing exemption for child
- **Drivers License (new in 2017)**
- **1095A , B or C Health Insurance Form**
- **1099-H Health Coverage Tax Credit Advance Payments**
- W-2 Forms for all Wages
- 1099 Forms for:
 - Interest
 - Dividends
 - Retirement
 - Social Security
 - Unemployment
 - Gambling Income
 - Other income
 - 1099-G State Taxable Refund
- Alimony Received
- All other statements of income
- Rental income and documented expenses
- Self-Employment income and documented expenses
- Contributions to Self-Employed Retirement Plan
- Stock Sale (including Cost Basis)
- Year End Statements from mutual funds and stocks
- Health Savings Account
- Moving Expenses
- Alimony Paid
- **IRA Basis information**
- IRA Contributions
- IRA year end statements
- Student Loan Interest
- Medical Expenses and Medical Mileage
- Real Estate Tax Statements for any property you own
- Vehicle Registration with Property Tax Paid for vehicles, campers, boats, trailers, etc (only property tax is deductible)
- 1098 Forms for Mortgage Interest
- Receipts for donations of money to charity
- Receipts for donations of property to charity
- Volunteer mileage
- Job related expense (unreimbursed by employer)
- Investment Related Expenses
- Higher Education Expenses (tuition, books, and fees) **with proof of payment**
- Child Care Expenses - letter from provider with provider’s name, address, EIN or SS#, amount pd for each child
- Settlement papers – if you bought or sold a house
- K-1 Forms from Partnerships, Corporations and Estates
- Adoption Expenses
- Estimated Tax Payments – dates and amounts
- Foreign Accounts - Bank Statements