Checklist – 2018

Name ____

Please check or enter info for all that apply. Use separate sheet as needed. Email or phone ________________________________

________ Did your family have **Health Insurance** all year? Bring **Form 1095-A** if through **Healthcare.gov**.

________ **Estimated payments** (both federal and state, including **amounts** and **dates paid**).

________ Forms **W-2 and 1099-R**, **Social Security**, **IRA** or **401(k)** distributions, other retirement income, Unemployment Compensation, HSA contributions/deductions, gambling income and losses.

________ Forms **1099** (interest, dividends, stock sales, miscellaneous income, cancellation of debt).

________ **All self-employment income** and **expenses**, equipment placed in service (including dates).

________ **All other income: cash work, foreign income**, **alimony** (maintenance)**, bartering,** etc.

________ Property tax, mortgage interest, points and PMI, office-in-home expenses, and **closing statements** from **home sale, purchase** or **refinance**.

________ **SALE OF INVESTMENTS**, including **COST, proceeds, and dates of transactions** (if you receive a **1099-B**, you have a sale). Please ask your broker for cost basis.

________ Tuition, books, fees from kindergarten to college - **MUST BRING 1098-T**; student loan interest.

________ Totals for medical expenses, including **health insurance premiums** you paid (not pre-tax), and long term care premiums (must exceed 7.5% of adjusted gross income to deduct).

________ Totals for charitable contributions, cash and non-cash, if itemizing deductions. You must have a proper, **written letter** from the charity if a **single donation of $250** or more. Please bring **receipts for non-cash donations** and their value for Amvets, Goodwill, etc.

________ Child care expenses (includes pre-school & day camp) and **provider's SS # or EIN** and address.

________ Unreimbursed employee business expenses (union dues, tools, supplies, safety gear, protective clothing, uniforms, cell phone, internet, job search and job-related educational expenses).

________ Business miles and total miles on vehicle for the year; miles between jobs or school.

________ IRA, Roth, IL Section 529 Plans, or Illinois college plan contributions, distributions, or rollovers.

________ Sales tax paid on any large purchases. Energy-saving improvements to your home.

________ If you want **direct deposit** of your refund, please provide the following information with your tax package: name of bank, routing number, account number, and whether it is a checking or savings account **(a copy of a check is preferred)**. Otherwise, it defaults to a check in the mail.

________ **If your spouse is not present** at the tax appointment, we need a **signed Power of Attorney** for one spouse to sign for the other. This also applies for a parent to sign for a non-minor child.

________ Other issues: **Financial assets outside USA of $10,000** or more**;** anyone you support (possible dependents); **Senior Exemption** or **Freeze**; other questions or relevant items. It is a good idea to bring your check register from the prior year to the appointment to look up amounts.

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