

CHECKLIST

Please bring all of the following applicable 2018 documents with you for your scheduled appointment. We would appreciate if you could present these items to us in the following order as it will make the preparation more efficient and timely:

- Social security numbers for new dependents.
- Please bring all Local Tax Forms.
- W-2 Forms from all employers & last pay stub - for reference (returns can't be prepared from pay stubs alone).
- 1099 Income Forms (Interest, Dividend, Retirement, Debt Cancellation, etc.) (including State/Local refund forms).
- 1099-Brokerage Statements reporting security sales & year-end/annual brokerage or investment statements. Make sure cost basis is included.
- 1095 A, B &/or C documenting health care coverage.
- Social Security benefits rec'd year-end statement(s) (contact SSA 800-772-1213 for a duplicate copy if not rec'd).
- Unemployment benefits rec'd year-end stmt(s) (contact 888-313-7284 or unemployment online www.state.pa.us).
- Schedule K-1 Forms, Federal & State(s), for interests in a Partnership, S Corporation, &/or Estate/Trusts.
- Farm income received this past year including from sales of livestock, crops, etc. & a summary of farm expenses.
- Alimony received or paid during 2018.
- 1099-G from Gambling winnings (including losses), all other misc. income.
- Income received from each Rental/Investment Properties & summary of expenses/property paid during 2018.
- Settlement sheets for all properties purchased &/or sold during 2018.
- If you refinanced, please contact the lender to confirm if you paid points (amount paid & length of loan needed).
- 1099-Misc Forms and other related summary for income received but not reported on a 1099-Misc. Also, an expense summary related to this income (we do not need you to bring actual receipts).
- Summary of un-reimbursed business mileage & expenses.
- Real Estate taxes paid in 2018 (school, county, township) & Forms 1098 for all mortgage/equity loans.
- Sales tax paid in 2018 on any car, boat, or large item purchased.
- Federal, State, Local Income tax estimate payments (detailed by date & amount paid).
- List of charitable contributions (cash & check). A letter is needed from any organization you donated > \$250.
- Non-cash contribution receipts—summary of what/where/ & when donated, estimated thrift shop value & approx original cost.
- Invoice for 2018 energy efficiencies for insulation, new heating system, water heater, solar system, windows, etc.
- Day care/summer camps for dependents under age 13: provider name, address, EIN or SSN & amount paid.
- Health/dental insurance & all related out of pocket medical expenses. The medical deduction also includes tuition paid for a dependent to attend special schooling. Only medical expenses over 10% of income are deductible.
- PA Property tax/Rent Rebate. Qualified retirees should bring stamped real estate tax bills.

NEW CLIENTS ONLY

- 2017 Tax Returns (federal, state and local).
- Social Security cards.