



# Tax Appointment Checklist Tax Year 2016

In order for us to prepare you tax returns accurately, please use this checklist to be sure you have all the information needed to complete your tax return. If you have questions, just give us a call at 277-4177!

## Personal Information

- Please complete one of our Client Info Worksheets
- Current Driver's License or Current Picture ID
- Social Security Card(s) for you and the Dependents you are claiming
- Copy of Last Year's Federal and State Tax Returns (if new client)

## Income

- Form W2 – Wage Statements from your job
- Form 1099-R – Pension or Retirement Income from IRA or 401K
- Form 1099-G Unemployment Income
- Form SSA-1099 Social Security Income
- Form 1099-INT & 1099-DIV – Interest and Dividend Income
- Form 1099-MISC Misc Income including Contract Labor, Rents, Prizes
- 1099-B – Sale of Stock or Bonds
- Form W2G Lottery or Gambling Winnings
- Alimony Received
- Jury Duty
- Schedule K1 Income from Partnerships, S-Corporations, Trusts & Estates

## Adjustments & Deductions

- Educator Expenses
- Moving Expenses
- Health Saving Account Contributions
- IRA/401K Contribution
- Alimony Paid
- Student Loan Interest Paid
- Medical, Dental, Eye Care Expenses Paid\*
- Real Estate Taxes Paid\*
- Mortgage Interest Paid\*
- Charitable Contributions\*
- Investment Expenses
- Job Related Education Expense
- Job Hunting Expenses
- Gambling Losses

## Credits

- Child & Dependent Care Expenses
- Education Expenses (College)
- Residential Energy Improvements (must meet required standards)  
Home Buyers Credit  
Electric Vehicle Credit

## Customized Worksheets

If any of these other issues apply, please complete the appropriate sections of our 2016 Client Organizer

- Itemized Deduction Worksheet
- Employee Business Expense
- Office in Home Worksheet
- Auto Expense Worksheet
- Self Employed Worksheet
- Farming Income Worksheet
- Rental Income Worksheet
- Sale of Your Home
- Bankruptcy & Debt Forgiveness

## Health Care Information

- Form 1095-A if insured through the Healthcare Marketplace (required)
- Form 1095-B if insured privately (now required)
- Form 1095-C if insured through your employer (now required)
- Exemption Information if not insured and eligible for an exemption

## Other Income or Deductions not listed

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You might find our 2016 Client Organizers are helpful if you are self employed, have rental property or other income & deductions that need listed and itemized.