

# 2017 Tax Filing Checklist

## Personal Information

- Full Legal Name of all those listed on return, including dependents
- Social Security Number for each person on the return, including dependents
- Birthdate for each person on the return, including dependents
- Current Mailing address
- Phone number
- Email Address

## Income Statements

- W-2
- 1099-Misc
- Unemployment Earnings (1099-G)
- K-1
- Interest Statents (1099-INT)
- Social Security Statements (SSA-1099)
- Gambling Winnings (1099-G)
- Stock/Bonds reporting (1099-DIV, 1099-B)
- Cancellation of Debt (1099-C)
- Any other income statements or records

## Expense Records

- Mileage Records
- Receipts for business expenses
- Personal Expense Records
- Medical Expense Records

## Other Statements

- Student Loan Interest
- Tuition Statement (1098-T)
- Mortgage Interest Statement (1098)
- Charitable Contribution Records or receipts
- Vehicle Tab Renewals
- Daycare Expenses
- School Supply Receipts
- HAS/FSA records
- IRA Contributions (outside of payroll deductions)
- Proof of Health Insurance (1095-A, 1095-B, 1095-C)
- Certificate of Rent Paid (MN, WI residents)
- Closing Statements from home purchase
- Purchase agreement for large purchases such as: car, ATV, RV, Motorcycle

## Other things to Bring

- Copy of Prior Year return (if new client)
- Direct Deposit information (Routing and Account number)
- Proof of eligibility to claim children (if needed)**
- Drivers License (or other form of Identification)

The above list is not all inclusive. If you receive a form you are unsure of, please bring with to your tax appointment and your tax preparer can help determine its requirements for filing. *Please note that all information provided (not provided) is the responsibility of taxpayer to prove, in the course of an audit. The taxpayer is responsible for verifying the return and all its contents.*