

INCOME TAX PREPARATION CHECKLIST OF ITEMS TO BRING

PLEASE remove these forms from the envelopes in which they were mailed to you and organize in the same order as listed below.

Most Common Forms

- _____ 2016 Tax Return (new clients only)
- _____ Most Recent Pay Stub(s)
- _____ W-2 Statement(s)

- _____ 1099-INT (Interest)
- _____ 1099-DIV (Dividends)
- _____ 1099-G (State Tax Refund)
- _____ 1099-B (Brokerage Sales)
- _____ 1099-R (Retirement/Pension Distributions)
- _____ 1099-G (Unemployment Compensation)
- _____ SSA-1099 (Social Security)

- _____ 1098-E (Student Loan Interest)
- _____ 1098-T (College Tuition)*

Itemized Deductions*

- _____ 1098 (Mortgage Interest)
- _____ Property Tax Statement*
- _____ Car Registration*
- _____ Charitable Giving/Statements*
- _____ Medical Expenses*
- _____ Employee Expenses*

Other Items

- _____ 1099-MISC*
- _____ Child Care Statement from Provider
- _____ Schedule K-1
- _____ Form 5498-SA (HSA Contributions)
- _____ 1099-SA (HSA Distributions)
- _____ 1095-A,B,C (Health Insurance)
- _____ Year-End Investment Statements
- _____ 1099-S (*from home sale/purchase*)*
- _____ Final Settlement Statement (*from home sale/purchase*)*

*Please complete additional details on the other page provided.