

ANDERSON TAX SERVICE

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CHECKLIST – 2016 TAX RETURN

Appointment: **Time** _____ **Date** _____

Please use this list to make sure that you have all records, cancelled checks, and receipts so preparation of your income tax return can be done accurately.

- 1. A copy of last year's Federal and State Tax Returns, if new client
- 2. All W2's, 1099's, Social Security year-end statements, and any foreign income statements
- 3. **Records of other income and expenses:**

Sale of Assets / Stock (Buy & Sell Date & Prices)	Mortgage interest paid statement
Rental Income / Expenses	Moving Costs, Distance Moved
Interest / Dividend Income	Property Tax, Sales Tax, DMV fees, Local Utility
Small Business P/L Statement	Record of major losses: accident, fire, theft, etc.
Real estate documents	Electric/Plug-in Vehicle or Energy Efficient -
- Sale, Purchase, Refi, Foreclosures	Home Improvement Documents
Contributions to Church & Charities*	All Medical-related Expenses
- 4. Amounts/date paid for estimated taxes and/or extension, if any (both Federal & State)
- 5. Records of child care expenses: include name, address, social security number or EIN number of providers and phone number
- 6. Dependent names, social security numbers and dates of birth
- 7. Records of tuition, books, and supplies for higher education expenses for yourself and/or dependent children, including trade schools; need form 1098-T
- 8. **Affordable Care Act:** For self-paid insurance, bring coverage information for all household members, including number of months covered, amount paid per month, and credit amount received. *If exemption was obtained, bring exemption certificate.* (Note: Employer-paid insurance information will be shown on W-2.) Bring Affordable Care Act Form 1095-A if you have insurance through Covered CA.

For any other questions or concerns, write them on the back of this sheet - bring your documents and we will review them during your appointment. **Please bring a check for Direct Deposit Information.**

* Call us for an Estimated Price Guide for donated goods.