ANDERSON TAX SERVICE

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CHECKLIST – 2017 TAX RETURN

Appointment Date & Time: ____

Please use this general checklist to help in gathering your tax records. If you are in a specialized field of work, please contact us for a job-specific checklist.

- ☐ 1. New clients: please bring a copy of last year's federal and state tax returns
- ☐ 2. All W2s, 1099s, Social Security statements, and other tax documents
- ☐ 3. Real estate transactions: final closing statements for sales, purchases, and refinances
- ☐ 4. Records of other income and expenses:
  - Mortgage interest statements
  - Property tax statements
  - Stock or asset sale information
  - Unreimbursed work expenses
  - Interest income statements
  - Dividend income statements
  - Rental income and expenses
  - Small business income and expenses
- ☐ 5. DMV expenses: VLF (Vehicle License Fees)
- ☐ 6. Contributions to charitable institutions – cash or check amounts and/or list of items
- ☐ 7. Credits: electric vehicle, energy efficient home improvements, retirement saver's credit, California renter's credit
- ☐ 8. Child care expenses letter: EIN (Employer Identification Number) or Social Security number of provider, along with name, address, phone number, and amounts
- ☐ 9. Education credits: higher education costs, for yourself and dependents – make sure to bring Form 1098-T for each institution
- ☐ 10. Student Loan Interest: deduction for interest paid as shown on Form 1098-E
- ☐ 11. Medical expenses: doctor and dentist fees, x-ray fees, lab fees, prescription drug costs, medical mileage, home caregiver and/or long-term care expenses
- ☐ 12. Health insurance: Affordable Care Act or Covered California statements, if applicable. Possible forms – 1095-A, 1095-B, 1095-C
- ☐ 13. Estimated tax payments, if applicable: amounts and dates paid
- ☐ 14. Other tax information or questions!

Please call us at (909) 593-0355 to schedule an appointment.