# TAX INFORMATION CHECKLIST
# BE SURE TO BRING THE FOLLOWING ITEMS WITH YOU

*****I MUST HAVE HEALTH INSURANCE INFORMATION IF YOU ARE <u>NOT</u> ON SOCIAL SECURITY OR DO <u>NOT</u> HAVE AN EMPLOYER PLAN***.**

_____1. All copies of W-2, W-2P and/or K-1 Forms.

_____2. All year-end lender loan statements, including those refinanced or paid off during 2015, including real estate interest paid as well as receipts for **personal property taxes** paid during 2015.

_____3. 2015 closing statements or settlement papers for any real estate transactions, including refinancing.

_____4. 1099 Forms reporting all stock sales for 2015 as well as purchase date and original cost information

_____5. 1099 Forms reporting unemployment compensation, state tax refunds and Social Security benefits.

_____6. 1099 Forms for all retirement fund transfers and/or distributions.

_____7. 1099-MISC Forms reporting other types of income.

_____8. Social Security Numbers for ALL dependents (if not previously supplied). **BE SURE TO INCLUDE ALL DEPENDENTS BIRTHDATES FOR NEW CLIENTS.**

_____9. For College students, include loan and tuition information statements (Form 1098-T).

_____10. Any information pertaining to business or rental income and expenses, if applicable.

_____11. Date and amount of each estimated tax payment.

_____12. **NAME, ADDRESS AND SOCIAL SECURITY NUMBER OR FEDERAL ID NUMBER OF ALL CHILD CARE PROVIDERS, IF APPLICABLE.**

_____13. Any IRS or State Department of Revenue correspondence received during the year.

_____14. Information for medical expenses if substantial and/or insurance payments if self employed. This includes Form 1095-A if you are on Obamacare.

_____15. Bank account information if requesting direct deposit of refund.

_____16. **PROVIDE US WITH A VALID EMAIL ADDRESS AND CELL PHONE NUMBER IN ORDER TO BETTER COMMUNICATE WITH OUR CLIENTS.**