Tel: 616.840.6352
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Income Tax Checklist

Personal Information & Prior Years' Tax Returns

- ❏ For you, your spouse and all your dependents, please provide: (new clients/dependents)
  - ❏ **Full name** (as shown on social security card) & **birthdates**
  - ❏ **Copy of social security cards** or tax ID number
- ❏ **Copy of current drivers' licenses** for you & your spouse (all clients)
- ❏ At least **prior year tax return** (prefer 3 years) (new clients only)

Sources of Income

Employment

- ❏ **W-2** forms showing wages from employers
- ❏ **Last paystub of year** for deduction details

Rental Income

- ❏ **Records of income and expenses**
- ❏ Rental **asset** information (**cost, date placed in service**, **description** of asset)
  - ❏ Include improvements, appliances, furnishings "placed in service" in current year

Retirement Income

- ❏ **1099-R** forms for pension, IRA, & annuity income
- ❏ **1099-SSA** or 1099-RRB forms showing social security/railroad retirement income
- ❏ **Forms 5498** showing current year contributions and year-end value of IRAs

Interest &/or Dividends and Investment Income

- ❏ **1099-INT, 1099-DIV, 1099-OID** for interest and dividend income
- ❏ **1099-B, 1099-S** for sales of stock or other property
  - ❏ **Cost or other basis and date acquired** for all stock/property sold, if information is not shown on 1099-B
- ❏ **Year-end Statements** for investment accounts
- ❏ **K-1s** for investments and business interests

Deductions

Educators
- ❑ Amounts paid for **classroom supplies**

IRA/SEP/SIMPLE Retirement plan **contributions**

Medical Expense **List with Totals**
- ❑ Paid to Doctors, dentists, hospitals, labs, and other medical payments
- ❑ Prescriptions
- ❑ Medical mileage **and** medical travel expenses

Health Insurance and Long-term Care Insurance
- ❑ **1095** forms showing Marketplace insurance (1095-A) or other insurance (1095-B or C)
- ❑ **5498-SA** form showing HSA contributions
- ❑ **1099-SA** showing HSA distributions
- ❑ Other **health insurance premiums** you pay that are not shown on other documents

Homeownership
- ❑ **1098** forms showing mortgage/equity loan interest paid
- ❑ **Year-end statements** showing home interest paid that is not reported on 1098
- ❑ **Property tax receipts** showing taxes paid

Charitable Donations
- ❑ **Receipts for cash/check and non-cash contributions**
  - ❑ If non-cash total is $500 or more, **contribution dates** & **value** of donated items
- ❑ **Charitable mileage, volunteer expenses for charitable organizations**

Sales Tax and Personal Property Taxes
- ❑ Invoices showing **large purchases** (over $1,500)
- ❑ Auto license renewals for all vehicles owned

Education Expenses
- ❑ **1098-T** form & **school account records** showing tuition paid and billed
- ❑ **1098-E** form or other records showing student loan interest paid
- ❑ Other records showing student loan are acceptable

Energy Efficient Expenses
- ❑ Receipts for installation of renewable energy sources in your home (**solar, geothermal**)
- ❑ Receipts for **energy saving home improvements** or purchase of **energy saving vehicle**