



TAX APPOINTMENT WORKSHEET

**IF ANY OF THESE CHANGES HAPPENED IN 2016 USE
THIS HANDY CHART OF WHAT YOU NEED TO BRING
FOR YOUR TAX PREPARATION APPOINTMENT**

EVENT		DOCUMENTS OR INFORMATION NEEDED
Married, Divorced or Separated in 2016		<ul style="list-style-type: none"> • Prior year returns • Finalized date, copy of decree • Copy of separate maintenance agreement • Community property allocation
Birth or Adoption		<ul style="list-style-type: none"> • Social Security Cards • Adoption Papers
Adoption Credit		<ul style="list-style-type: none"> • Expenses, date and amounts • Date of Adoption (court papers) • Special Needs Certification
Death of Spouse or Child		<ul style="list-style-type: none"> • Date of Death
Additional Members of Household		<ul style="list-style-type: none"> • Date of occupancy • Relationship • Social Security Cards • Date of Birth
Job Change		<ul style="list-style-type: none"> • Start Date • Name of New Employer • W2 from old and new employer
Retirement: CONTRIBUTIONS		<ul style="list-style-type: none"> • Type of Plan • Amount of Contribution • Date(s) of Contribution
Retirement: Distributions		<ul style="list-style-type: none"> • Form 1099R • Rollover 1099R and backup • RMD information (701/2)
Unemployment		<ul style="list-style-type: none"> • State Unemployment Form
Social Security Benefits		<ul style="list-style-type: none"> • Form SSA-1099
Sale of Stocks, Bonds, Mutual Funds		<ul style="list-style-type: none"> • 1099-B • Basis of original purchase with date, number of units and amount (if not provided on 1099B
Sale or Purchase of home		<ul style="list-style-type: none"> • Purchase/Sale Papers HUD-1
Inheritance		<ul style="list-style-type: none"> • Will or K1 from the Estate
Gifts Made Cash or Property in EXCESS of \$14,000		<ul style="list-style-type: none"> • Description of Property • Donee Name • Basis of Property given of Donor
Gifts Made: CHARITABLE		<ul style="list-style-type: none"> • Receipts/Letters • Basis of Collectibles • FMV at Thrift of goods given

Trade of Property Vehicles used in business or rental Property used as Rental		<ul style="list-style-type: none"> • Date of Property given • Date of Property Received • FMV of property • Sec 1031 exchanges-Qualified Intermediary agreements and closing papers
Start or End of Business		<ul style="list-style-type: none"> • Formation Date and related paperwork • Property Contributions • K-1s if applicable
Self Employment Income Schedule C		<ul style="list-style-type: none"> • QB back up • Record of ALL income and Expenses • 1099s (Misc and K) • Beginning and Ending Inventory (if applicable) • Mileage records • Records of all major equipment purchases
Lawsuit Settlements		<ul style="list-style-type: none"> • Date of settlement receipt • Reason for Settlement • 1099-Misc
Rental Property		<ul style="list-style-type: none"> • Income • Expenses • If new, HUD1 showing property purchased • Converted personal residence to rental FMV at time of rental • If sold, HUD1 showing sale
Prizes and Awards		<ul style="list-style-type: none"> • Form 1099-Misc • Value of Prizes if not reported on 1099
Lottery or Gambling Winnings		<ul style="list-style-type: none"> • Total of ALL winnings- include W2G • Report of Losses
Health Insurance		<ul style="list-style-type: none"> • HAS forms • 1095 from Healthcare.gov • Employer provided healthcare form • Exemption letter from healthcare.gov if ineligible • Proof of Church based shared health care coverage for all year with name(s) of those covered
Medical expenses		<ul style="list-style-type: none"> • Totalled amounts of OUT OF POCKET categories: • Doctors and hospitals • Eye glasses and contacts • PRESCRIPTION Drugs • Long term health insurance contracts • RECORDS of prescribed medical equipment
State, Real Estate and/or property taxes		<ul style="list-style-type: none"> • Property tax bills
Refinance of primary home or rental		<ul style="list-style-type: none"> • Finance paperwork
Mileage for Medical, Charitable, Business, Rental		<ul style="list-style-type: none"> • Written proof of mileage
TRANSFER OF IRA TO CHARITY		<ul style="list-style-type: none"> • Brokerage statement showing transfer • 1099R • Letter from Organization showing receipt
Job Related Expenses Including job seeking expenses		<ul style="list-style-type: none"> • Breakdown of meals, lodging, mileage record, out of pocket business supplies
Education Expenses Tuition Credits		<ul style="list-style-type: none"> • 1098T from Institution • Expenses for books, supplies not covered in tuition

Student Loan Interest		<ul style="list-style-type: none"> • 1098-E or letter showing student loan interest paid
Child or disabled spouse care		<ul style="list-style-type: none"> • Name, Address, Federal Employer Number or Social Security Number of Provider • Amount paid
Bankruptcy		<ul style="list-style-type: none"> • Date filed • Paperwork by the Court showing Type and debit forgiven
Debt Forgiveness		<ul style="list-style-type: none"> • 1099A • 1099C • Date property was taken in foreclosure
IRS or State letters/notices		<ul style="list-style-type: none"> • Copies of letters • Amounts paid or received
Foreign income or investments		<ul style="list-style-type: none"> • Investments or bank with \$10,000 or more with signature authority • Foreign business or stock of \$50,000 • FBAR reporting MUST BE DONE on or before April 1st