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		• Prior year returns • Finalized date, copy of decree • Copy of separate maintenance agreement • Community property allocation
Birth or Adoption		• Social Security Cards • Adoption Papers
Adoption Credit		• Expenses, date and amounts • Date of Adoption (court papers) • Special Needs Certification
Death of Spouse or Child		• Date of Death
Additional Members of Household		• Date of occupancy • Relationship • Social Security Cards • Date of Birth
Job Change		• Start Date • Name of New Employer • W2 from old and new employer
Retirement: CONTRIBUTIONS		• Type of Plan • Amount of Contribution • Date(s) of Contribution
Retirement: Distributions		• Form 1099R • Rollover 1099R and backup • RMD information (701/2)
Unemployment		• State Unemployment Form
Social Security Benefits		• Form SSA-1099
Sale of Stocks, Bonds, Mutual Funds		• 1099-B • Basis of original purchase with date, number of units and amount (if not provided on 1099B
Sale or Purchase of home		• Purchase/Sale Papers HUD-1
Inheritance		• Will or K1 from the Estate
Gifts Made Cash or Property in EXCESS of $14,000		• Description of Property • Donee Name • Basis of Property given of Donor
Gifts Made: CHARITABLE		• Receipts/Letters • Basis of Collectibles • FMV at Thrift of goods given

Trade of Property Vehicles used in business or rental Property used as Rental		• 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		• Formation Date and related paperwork • Property Contributions • K-1s if applicable	
Self Employment Income Schedule C		• 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		• Date of settlement receipt • Reason for Settlement • 1099-Misc	
Rental Property		• 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		• Form 1099-Misc • Value of Prizes if not reported on 1099	
Lottery or Gambling Winnings		• Total of ALL winnings- include W2G • Report of Losses	
Health Insurance		• 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		• Totaled amounts of OUT OF POCKET categories: • Doctors and hospitals • Eye glasses and contacts • PRECRIPTION Drugs • Long term health insurance contracts • RECORDS of prescribed medical equipment	
State, Real Estate and/or property taxes		• Property tax bills	
Refinance of primary home or rental		• Finance paperwork	
Mileage for Medical, Charitable, Business, Rental		• Written proof of mileage	
TRANSFER OF IRA TO CHARITY		• Brokerage statement showing transfer • 1099R • Letter from Organization showing receipt	
Job Related Expenses Including job seeking expenses		• Breakdown of meals, lodging, mileage record,out of pocket business supplies	
Education Expenses Tuition Credits		• 1098T from Institution • Expenses for books, supplies not covered in tuition	

Student Loan Interest		• 1098-E or letter showing student loan interest paid	
Child or disabled spouse care		• Name, Address, Federal Employer Number or Social Security Number of Provider • Amount paid	
Bankruptcy		• Date filed • Paperwork by the Court showing Type and debit forgiven	
Debt Forgiveness		• 1099A • 1099C • Date property was taken in foreclosure	
IRS or State letters/notices		• Copies of letters • Amounts paid or received	
Foreign income or investments		• 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	