Tax preparation checklist:

Personal information:

☐	Fill out the "individual client questionnaire" if you have not done so earlier
☐	Attach copies of last year's tax return for you and your spouse (If we did not file your taxes last year)
☐	Provide bank account number and routing numbers, for direct deposit of refund

Information about your income:

☐	Wages, salaries & other employee compensations (Enclose W-2's, 1099 forms)
☐	Social security benefits received (Enclose 1099 SSA forms)
☐	Interest income (Enclose 1099-INT and statements of tax-exempt interest earned)
☐	Dividend income (Enclose 1099-DIV and statements of tax-exempt dividends earned)
☐	Capital gains & losses (Enclose 1099-B with supplemental year end brokerage statements)
☐	Capital gains & losses (Provide any sales NOT reported on forms 1099-B and 1099-S)
☐	Pension, IRA and annuity income (Enclose forms 1099-R)
☐	Miscellaneous income (List and enclose all related 1099 forms or other forms):
☐	State and local income tax refunds
☐	Alimony received
☐	Jury Fees
☐	Finder's Fees
☐	Tip income not reported by your employer
☐	Unemployment Compensation (Enclose form 1099-G)
☐	Director's Fees (Enclose form 1099-MISC)
☐	Prizes (Enclose form 1099-MISC)
☐	Gambling winnings (Enclose form W2-G)
☐	Other miscellaneous income

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Foreign income:

If you earned any income outside of the US, please complete the questions below. Please note that there are certain requirements and forms you need to submit based on the amount of income you earned. Please check with us if we need to file the additional forms for you.

☐	Did you have any interest in, or signature, or other authority over a bank, securities, or other financial account in a foreign country whose aggregate financial value exceeded$10,000 at any time during the tax year?
☐	Were you the grantor, transferor or beneficiary of a foreign trust?
☐	Did you have foreign income, pay any foreign taxes, or file any foreign information reporting or tax return forms? If yes, provide details.

Other income/expense related questions:

For the following items, we need additional details to complete your tax return. If any of the following applies to you, please complete the related organizers located in the public folder on the client portal.

☐	Did you sell, purchase or refinance a principal residence or other real estate? If yes, please complete "Sale/Purchase of Personal Residence Organizer".
☐	Do you own a business? If yes, please complete the "Self-Employment Income Organizer".
☐	Do you own rental property? If yes, please complete the "Rental Property Organizer".
☐	Did you incur any employee related expenses? If yes, please complete the "Employee Business Expenses Organizer".

Adjustment to your income:

The following items can help reduce the amount of your income that is taxed, which can increase your tax refund, or lower the amount you owe.

☐	Student loan interest paid (Enclose form 1098-E)
☐	Tuition paid (Enclose form 1098-T for tuition paid). Also, provide the details of the post-secondary educational (degree pursued, level in years)
☐	Child care cost (Provide child care provider's name, tax ID, address and amount paid)
☐	For teachers: Canceled checks or receipts for expenses paid for classroom supplies, etc.
☐	IRA contributions made during the year
☐	Receipts for any qualifying energy-efficient home improvements (solar, windows, etc.) or vehicle purchased during the year
☐	Records of Medical Savings Account (MSA) contributions

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☐	Self-employed health insurance payment records
☐	Records of moving expenses
☐	Alimony paid
☐	Keogh, SEP, SIMPLE, and other self-employed pension plans

Deductions and credits:

The government offers a number of deductions and credits to help lower the tax burden on individuals, which means more money in your pocket. You'll need the following documentation to make sure you get all the deductions and credits you deserve:

☐	Mortgage interest and points paid (Enclose form 1098)
☐	Charitable donations (Provide written acknowledgment from any charity to which you made individual donations of $250 or more during the year)
☐	Medical and dental expense records (Please provide details only if you feel that the expenses are over 10% of your AGI)
☐	State and local income taxes paid
☐	Real estate taxes paid
☐	Personal property taxes (on vehicles, and merchandise purchase)
☐	Estimated payments made for the tax year to the federal and state government
☐	Adoption costs: SSN of child; records of legal, medical and transportation costs
☐	Casualty and theft losses: amount of damage, insurance reimbursements
☐	Miscellaneous deductions (List and enclose all related 1099 forms or other forms):
☐	Union dues
☐	Income tax preparation fees
☐	Legal fees (provide details)
☐	Investment expenses
☐	Professional dues
☐	Documented gambling losses

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☐	Trustee fees
☐	Other miscellaneous deductions

Healthcare:

☐	If you and the members of your household were covered by a company provided health insurance policy - Enclose forms 1095-B or 1095-C
☐	If you purchased health insurance from marketplace -Enclose form 1095-A
☐	If you or any member of your household were not covered by health insurance for any months during the year, fill out the "healthcare exemption checklist" located in the public folder on the client portal.

The above checklist is intended to provide generalized financial information designed to educate our clients; it does not give personalized tax, investment, legal or other business and professional advice. Before taking any action, please consider to seek our advice on your taxes, your investments, the law or any other business and professional matters that affect you and/or your business.

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