"2018" READINESS CHECK LIST

1. Bring a record of the dates and amounts of any estimated tax payments made, and record of any other payments made.
2. Social Security (and ITIN) numbers and cards, birth dates for children and other dependents are needed.
3. Need ALL W-2's, 1099's, and 1098's; those for interest, dividends, investments, tax refunds, self-employment, sales, pensions, IRA rollovers, unemployment, Social Security, 1099-A, 1099-C, and any other income along with those showing mortgage interest paid.
4. **Need 1098-T's with the financial transcript from the college showing 2018 education expenses plus cost of books and needed equipment.**
5. **IMPORTANT: Bring your last pay statement & your last pension statement - contains needed information that is not shown elsewhere.**
6. Any miscellaneous or other income and related expenses.
7. Contributions to "Traditional" and "Roth" IRAs & Health Savings Accounts with 1099-SA for HSA distribution.
8. *List of* deductions for medical expenses, **property taxes paid**, vehicle license plate costs, mortgage interest (1098), charitable contributions **(must have receipt, check stub or other proof)**.
9. Sales tax paid on major purchases, including vehicles, boats, mobile homes, home construction & off-road vehicles & on vehicle leases.
10. **Property tax statements for *both* summer and winter 2018 as well as information giving 2018 taxable value of personal residence.**
11. Rent: Need name and address of landlord and amount of rent paid.
12. Use Tax: Purchases on which no sales tax was paid.
13. **E-file:** Need bank account number for direct deposit.

AFFORDABLE HEALTH CARE (ACA) (Obamacare)

- You need to bring Form **1095-A** if you bought insurance through the Marketplace; Form **1095-B** or **1095-C** if covered by insurance.

14. Copies of K-1's from partnerships, S Corporations, estates and trusts.
15. Business mileage – Bring beginning & ending odometer readings for 2018 as well as business miles.
16. Year-end statements showing transactions from mutual funds/brokerage accounts. ***Important:*** need **all pages** showing any activities and information.
17. If you bought, sold or refinanced during the year, bring all closing statements.
18. If have foreign bank or retirement accounts, bring 2018 statements.
19. If IRA transferred directly to church or charity, bring proof.

If you receive *any* letter pertaining to your taxes please bring it (them) in *before* taking any action yourself.

Bring a list of your questions/issues/concerns for this tax year & future years.

THANK YOU

We Appreciate Your Business
At
Meredith Tax Service
Website: meredithtax.com

(810) 329-8818	(810) 765-1200	(810) 982-6300
817 Clinton Ave	240 S Parker	1721 Pine Grove
St. Clair, MI	Marine City, MI	Port Huron, MI
48079	48039	48060

Income Taxes•Electronic Filing•Bookkeeping•Securities•Notary