"2017" 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 2017 education expenses plus cost of books and needed equipment.**
5. **Bring your last pay statement for 2017 and your last pension statement for 2017 as they contain important needed information.**
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)**, investment expenses *and* work-related expenses.
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 2017 as well as information giving 2017 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.
- If you applied for an insurance exemption, you need to bring the letter with the **exemption number.**

14. Copies of K-1's from partnerships, S Corporations, estates and trusts.
15. Business mileage – Bring beginning & ending odometer readings as well as business miles.
16. Year-end statements showing transactions from mutual funds/brokerage accounts. ***Important:*** need **all pages** showing purchase costs and dates for any "trading" activities.
17. If you bought, sold or refinanced during the year, bring all closing statements.
18. If have foreign bank or retirement accounts, bring 2017 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.