

“2016” 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 transcript from the college showing 2016 education expenses plus cost of books and needed equipment.**
5. **Bring your last pay stub for 2016 and your last pension statement for 2016 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.
10. **Property tax statements for both summer and winter 2016 as well as information giving 2016 taxable value of personal residence.**
11. **Certification** for energy efficient windows, doors, furnace, insulation, air, or roof.
12. Rent: Need name and address of landlord and amount of rent paid.
13. Use Tax: outstate purchases on which no sales tax was paid.
14. **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**.
15. Copies of K-1's from partnerships, S Corporations, estates and trusts.
 16. Business mileage – Bring beginning & ending odometer readings as well as business miles.
 17. Year-end statements showing transactions from mutual funds/brokerage accounts. **Important:** need all pages showing purchase costs and dates for any “trading” activities.
 18. If you bought, sold or refinanced during the year, bring all closing statements.
 19. If have foreign bank or retirement accounts, bring 2016 statements.
 20. 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