



Accounting | Consulting | Tax Return Preparation

WHAT SHOULD I BRING TO MY PERSONAL 2017 INCOME TAX APPOINTMENT

NEW ITEMS FOR 2017:

- ✓ Photo ID's (driver license) of each tax payer
- ✓ Social security cards for all dependent children listed on your tax return, as well as any other dependents listed
- ✓ Home address of each dependent shown on an insurance or medical bill, school correspondence, etc.

ROUTINE ITEMS NEEDED:

- Your personal 2017 Tax Organizer and Deductions Finder (DirkCPA.com under "Tax Resources")
- All end of year 2017 tax documents:
 - FORM W-2 wages
 - FORM 1095-A, B, or C health insurance
 - FORM 1098 mortgage interest statements
 - FORM 1098T if claiming college/university, books receipts, financial transcripts issued by institution
 - FORM/s 1099 such as 1099-INT for interest, 1099-DIV for dividends, 1099-B for sales of securities, 1099-R for annuities, pensions, and IRAs or other retirement plans withdrawals, 1099-G for state tax refunds, 1099-S for real estate sales
 - SSA-1099 for Social Security, 1099-G for unemployment compensation, 1099-K for merchant card and third-party network payments and 1099-MISC for commission and fees, etc. *Include all copies*
- Copies of Schedules K-1 for partnerships, joint ventures, S corporations, estates, trusts, etc.
- If you sold real estate, stock or mutual fund shares during the year, provide closing statement or other supporting information:
 - Property Description
 - Purchase price
 - Sales Price
 - Date Acquired
 - Date sold
 - Expenses of Sale
- If you acquired, sold or refinanced a home or other property in 2017, bring a copy of the closing statement
- Medical insurance coverage information for all members of your household listed on your tax return
- Physical mileage log if claiming any auto deductions
- Detailed inventory of non-cash charitable donations
- If you are a new client, provide copies of tax returns for 2014, 2015, and 2016

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