

10/02/18

TAX APPOINTMENT CHECKLIST

Please be sure to bring any of the following, **if applicable**, along with the rest of your tax information, **to your tax appointment or** when dropping off:

- Just as a reminder, we cannot start your 2018 tax return **without your signature(s) on the engagement letter along with all of your 2018 tax information**. If you are filing a **joint return, print an engagement letter from our web site, if applicable**, (located under Worksheets & Forms). Both spouses/partners must read, sign and date the engagement letter.
- Copy of driver's license for anyone filing tax return.
- New clients: If you are a new client, we will need a copy of all your dependent's social security card and birth certificate.
- New dependents for existing clients: We will need a copy of your new dependent's social security card and birth certificate.
- All dependents under the age of 17: We will need documentation such as school records, medical bills or any other document which shows your child's name, the address where the child lives and the parent(s) name claiming the child.
- If you want your refund directly deposited or balance due automatically withdrawn we will need the **Bank Verification Form** signed by all parties noted on the return. You will find the **Bank Verification Form** on our web site under "Worksheets & Forms."
- Please remember to include your last YTD payroll stub(s) from each employer that was paid and dated in 2018.**
- If you have a rental property, business or hobby and paid anyone for services of \$600.00 or more throughout 2018, you will need to submit Form 1099 MISC.** If you would like us to complete your 1099 forms please have the proper information in **our office by January 11, 2019. Failure to file 1099's by January 31, 2019 may incur a penalty from the IRS of \$260.00 per 1099 that is not filed.** Please visit our web site if you would like to use our 1099 worksheet.
- Business owners, landlords and certain employees** - Please do not forget to log your odometer 12/31/18. Also, if applicable, do not forget to value your inventory on 12/31/18 using the actual cost you paid.
- Do you have health insurance coverage?** As we are preparing this letter, we do not know what we will need related to your health insurance. If the mandate is the same as last year you will receive Form 1095 Health Insurance Coverage Statement from your employer, health insurance provider, or healthcare.gov on or before February 1, 2019. All individuals and family members you are claiming as an exemption on your income tax return and have health insurance will be listed on a Form 1095, so you might receive multiple 1095 forms. **We may not be able to complete your 2018 federal income tax return without your Form 1095. Please check our web site or call our office for updated information on this issue.**
- If applicable, any worksheets or the completed questionnaire.