CLIENT CHECKLIST
FOR THE TAX YEAR 2017

YOU SHOULD BRING ANY OF THE FOLLOWING THAT APPLY:

1. Last year's return
2. All wage statements (W-2s)
3. All pension statements (1099-Rs)
4. Interest statements (1099-INTs)
5. Dividend statements (1099-DIVs)
6. Nonemployee (independent contractor) compensation statements (1099-MISC)
7. Investment Earnings and Capital Gains/Losses (1099-B, 1099-INT, 1099-DIV, etc.)
8. Schedule(s) K-1 from partnerships, S Corporations, estates, or trusts
9. Mortgage interest statements (Form 1098)
10. Property tax statements and proof of the amount you paid in tax year 2017
11. Settlement statements for purchase or refinance of home and other real property
12. Rental income and expenses
13. Last year's state tax refund or Unemployment Compensation statement (1099-G)
14. Your record of the estimated quarterly tax payments you made for tax year 2017
15. Your current e-mail address (only if it's OK for me to contact you via e-mail)
16. Change in bank accounts if you choose direct deposit of your refund
17. If you have a business, all business income and expenses

I also need to know of any changes in marital status, number of dependents, name, address, phone numbers, etc.

If this is your first year with me I need to know each household member's social security number and date of birth.