

## **CHECKLIST TO HELP YOU ORGANIZE YOUR 2017 TAX INFORMATION**

Some may apply to you, some may not.

1. Copies of all W-2(s), and 1099(s) reporting Wages, Gambling winnings, Interest, Dividends or Pension Distributions
2. 1099 forms reporting Unemployment Compensation, Social Security Benefits, Miscellaneous Income and State Tax Refunds
3. Brokerage Statements regarding the Sale of Stock, Original Cost and Purchase Date of Stock.  
**(PLEASE BE AWARE MANY STATEMENTS ARE ISSUED ONLINE ONLY)**
4. Copies of K-1 forms from Investment in a Business Entity.
5. Names, Social Security Numbers and Dates of Births for all dependents. Any changes in 2017?
6. Real Estates Taxes, Town Vehicle Taxes and State Taxes paid, Sales Tax on Motor Vehicles (*For Mass residents age 65 or older who rent or pay real estate taxes bring tax bills and water & sewer bills*)
7. Mortgage Interest paid and any closing documents if you bought, sold or refinanced.
8. Medical Insurance, Prescriptions, Doctors, Dentists, Glasses and Medical Mileage.
9. Charitable-Church, cash, clothes, furniture, etc. (*please bring receipts for all*) and Charitable Mileage
10. Miscellaneous deductions such as: safety deposit box fees, union and professional dues, job hunting, uniforms, licenses, tax preparation fees etc.
11. For **Business Use** of Vehicle: Mileage and Auto Expenses (*we need to know total miles, commuting miles, and business miles driven*). Please provide your mileage log. One is available on our website.  
[www.Larsontaxservice.com](http://www.Larsontaxservice.com)
12. Name, address, Tax ID numbers, and amount paid to all Childcare Providers
13. Record of Estimated Tax Payments made and date of payment.
14. Landlord's Name, Address and Rent Paid (*State of Mass residents only*).
15. Contributions to an IRA or a Roth IRA, 401K, 403B.
16. Theft or casualty loss information.
17. Documentation for Tuition and/or Student Loan Interest. (*Must have form 1098-T for deductions*)
18. Records of Rents Collected and Expenses Involved in Rental Activity.
19. Records of Income and Expenses from Self-employment Activity (Please provide a prepared Profit & Loss)
- 20. IMPORTANT – ALL BUSINESSES** Copies of all 1099's you issued to others (Subcontractors, ETC.)
21. Records of any Alimony Paid or Received.
22. **FOR NEW CLIENTS** please bring a Copy of your 2016 Tax Return and picture I.D.
23. Information regarding health insurance coverage. **Proof of health insurance**