Brandywine Advisors Group & Accurate Business Services

Tax Appointment Checklist

2018 Returns

- **Personal information** - Please fill out our 2018 tax organizer also.
  - ✓ Last year's (2017) income tax return, if you are a new client
  - ✓ Name, address, Social Security Number(SSN) and Date of Birth for yourself, spouse and ALL dependents - Including copy of DL/ID's.
  - ✓ Dependent Provider, Name, Address, Tax ID and S.S.N.
  - ✓ Banking information if Direct Deposit Required, Voided Check.
  - Health Insurance Verification - 1095A, 1095B, 1095C (where applicable). Now Required for 2018.

- **Income Data Forms Required** -
  - Wages – ALL W2(s) and Last Pay Stub(s)
  - SSA-1099, RRB-1099 for ALL Social Security(RRB) Income (all)
  - Interest and/or Dividend Income (1099-Int and/or 1099-Div)
  - State/Local income tax refunded from 2016
  - Social Assistance Income
  - ALL Pension/Annuity/Stock or Bond Sales (1099R and 1099B)
  - Contract/Partnership/Trust/Estate Income – Schedule K-1
  - Gambling/Lottery Winnings and Losses/Prizes/Bonus
  - Alimony Income

- Rental Income
- Self Employment/Tips/Cash Wages (1099)
- Unemployment Compensation (1099-G)
- Foreign Income

- **Expense Data Required** -
  - Dependent Care Costs
  - Education/Tuition Costs/Materials Purchased Per Student
  - Medical/Dental Expenses
  - Mortgage/Home Equity Loan Interest/Mortgage Insurance
  - Employment Related Expenses
  - Gambling/Lottery Expenses
  - Tax Return Preparation Expenses
  - Investment Expenses
  - Real Estate Taxes
  - Estimated Tax Payments to Federal and State Government and Dates Paid
  - Home Property Taxes
  - Charitable Contributions Cash/Non-Cash with Receipt
  - Purchase qualifying for Residential Energy Credit
  - IRA Contributions/Retirement Contributions – Regular and Roth IRA
  - 401(k), 403(b) Statement, and/or Pension Statement – Dec 2017
  - Home Purchase/Closing/Moving Expenses

Please bring any documents you believe have importance for your tax filing. Thank You.