-										
Client Name:										
			Miller Block Building	Do you have? Roth IRA						
2018	Tax Record C	hecklist -	165 5th St SE	529 Plan Educa						
			Pine City, MN 55063	401K or other retire pl						
			Tel (320) 629-4745	HSA						
Please bring the follow	wing items to your appointm	ent:	Fax (516) 941-0225 Credit card de							
			email todd@toddstaxservice.com							
Please bring in a co	opy of your 2017 tax return a	and a photo ID if		Cell (612) 242-5713 texts ok.						
W-2 Forms. Bring	final paystub too - it contain	ns info not always	on your W-2.							
1099 Forms. (The	ese could be 1099-R, 1099-	MISC, 1099-S, 10)99-Int)							
Certificate of Rent	t Paid if you rent your home.				INCOME CHECKLIST					
Property Tax State	ement (most recent) if you o	own your home.								
					Wages	W-2				
			YES NO		Unemployment	1099-G				
Has your marital statu	s changed since 12/31/17?				Interest	1099-INT				
Are there new depen	dents in your household sir	nce 12/31/17?*			Gambling	W-2G				
Have you received an	y correspondence re your 2	2017 taxes?			Self Employment	1099-MISC				
Do you need advice o	on any special issues now or	r in 2018?			IRA/ 401K Distribution	on 1099-R				
Do you have a bank (checking or savings accoun	nt)?	Other - please specify:							
Did you sell a home ir	า 2018?				Foreign Accounts?					
Are you still waiting fo	or certain tax documents to o	come?			Open IRS Issues?					
Have you filed for ban	kruptcy or had debt cancell	ed in 2018?			HSA Distribution (Fo	HSA Distribution (Form 1099SA)				
Do you have health ir	nsurance?			Form 1095-A from H	ealth Exchange					
Did you receive any n	ontaxable income?			Forms 1095 -A,B or C (Health)						
-	/IFIPWork Comp < 0	Check all that apply.	<u> </u>		<u> </u>					
	ity card and birth certificate f		endents on your return.		DEDUCTION /CRED	DIT CHECKLIST				
=	ing both (SS card and birth				Check all that apply - include docments	or show on reverse side of checklist.				
Contact Info :	5 (,	,		Medical Bills - see re					
Taxpayer:	DOB	SSN			Mortgage Interest					
Spouse:	DOB	SSN			Property Taxes					
'					Contributions					
Address:					Work Related Expen	ses No longer deductible				
			New Dependents:		Tuition	3				
			Name SSN	DOB	Casualty/Theft Loss					
Home Telephone:			rtamo cort	202	Daycare expenses					
Cell Phone:					Student Loan Interes	st				
Email:					Auto Tax (Tabs)					
					State:					
State Income Tax -Did	d you live or work in another	r state other than	vour home state? Y	N	Minnesota K-12 Sch	ool				
Dates of Residence:	ST # 1	ST #2	,		Wisconsin Rent/Prop					
Spouse Date if diff:	ST # 1	ST #2		7	YN WI Rent - Heat Paid					
Cpodoo Dato ii diii.	S. " 1	O1 πZ			virtont ricati aid	•				

				Deductions/ Credits Detail					
Daycare Info:				Itemized Deductions:					
Name of Provider:									
Address of Provider:				Medical Expenses -out of pocket	Work Expenses	Mortgage Interest			
Fed Tax ID of Provider:				Health Insurance (not pretax)		Did you refi in 18?	′ N		
Amount Paid: Care for:/				Prescriptions		Interest Paid - Lender 1			
				Co-Pays	NOT	Interest Paid - Lender 2			
				Dental	NOT	Interest Paid - Lender 3			
Tuition Information:				Eye					
We need 1098-T AND cancelled checks!				Chiropractor		Mortgage Ins Prem	•		
Name of College Student:				Hospital		, , ,			
Name of College				Other - please list					
Out of Pocket Costs - list:					5-5-10-5-				
Tuition and Fees					DEDUCTIBLE				
Books (Required)									
Grants / Scholarships?									
·			_						
						1	•		
Name of College Student:				List only expenses paid out of pocket.		Minnesota School Expe	nses:		
Name of College				(HSA or pretax payments treated separately).		Name:			
Out of Pocket Costs - list:					<u></u>	Grade:			
Tuition and Fees				Total Fee		Supplies			-
Books (Required)				Car # 1 Tabs (License Plates)	Contributions:	Music Lessons			-
Grants / Scholarships?				Car # 2 Tabs (License Plates)	Cash - list	Musical Instrument			-
	=			Car #3 Tabs (License Plates)		Computer Purchase			-
				The personal property tax is deductible		Tuition/Tutoring			-
				and is the amount over \$52.		Transportation Paid			-
Mileage:	Car #1	Car #2		Boat, Snow Mobile, RV, Trlr - NOT DED			•	•	
Description of Vehicle:			State Balance Due Paid for 2017	Do not include:					
			State Balance Due other years	Cannot exceed \$500 without detail.	internet fees, school lunches, clothing				
Gross (Total) Mileage for YR			Interest on back taxes is not deductible.		optional items.				
, ,				Did you buy a new car, boat or RV?		You must have receipts	for school iten	ns.	
Commuting Miles (not ded)				Real Estate Tax Paid		·			
Work related miles not DEDUCTIBLE				Home	Minnesota allows a subtraction for	2018 Standard Deduction	on (Short Form	Amount)	
Charity Miles				Cabin/Second Home	contributions over \$500 even if you	Single	12000	+65	1600
Medical Miles				Land	don't itemize your deductions on Federal.	Head of Household	18000	+65	1600
You must have written records (log) to take a deduction	n.	•	-	Penalties and late payment interest not deductible.		Married Filing Joint	24000	+65	1300
Mileage to and from home and work is not deductil	ble.					(Higher for 65+)	-	+65	
	2016	2017	2018		Office in home				
Mileage Rates					Must use office area exclusive Minnes	sota Non Game Wildlife Desig	gnation: YES	S NC	ວ
Business Use	54¢	53½¢	54½¢		for business. Ask for info. US Pro	esidential Election Fund Y	ES NO_	_	
Medical	19¢	17¢	17¢	Sales Tax on new car or truck:	Minnes	sota Political Party: R D	G	_ I	
Charitable	14¢	14¢	14¢	Use higher of income tax or sales tax.					
Moving	19¢	17¢	17¢		Please attach a vo	oided check for direct deposit	or direct debit	. Too	dd's Tax