

Client Name: _____

2018 Tax Record Checklist - Wage Earner

Please bring the following items to your appointment:

- Please bring in a copy of your 2017 tax return and a photo ID if you are a new client.
- W-2 Forms. Bring final paystub too - it contains info not always on your W-2.
- 1099 Forms. (These could be 1099-R, 1099-MISC, 1099-S, 1099-Int)
- Certificate of Rent Paid if you rent your home.
- Property Tax Statement (most recent) if you own your home.

- Has your marital status changed since 12/31/17?
- Are there **new dependents** in your household since 12/31/17?
- Have you received any correspondence re your 2017 taxes?
- Do you need advice on any special issues now or in 2018?
- Do you have a bank (checking or savings account)?
- Did you sell a home in 2018?
- Are you still waiting for certain tax documents to come?
- Have you filed for bankruptcy or had debt cancelled in 2018?
- Do you have health insurance?
- Did you receive any nontaxable income?

	YES	NO

VA Benefits MFIP Work Comp < Check all that apply.

* Bring a social security card and birth certificate for any NEW dependents on your return.

New clients should bring both (SS card and birth Cert) for all children on the EIC form)

Contact Info :

Taxpayer:	DOB	SSN
Spouse:	DOB	SSN

Address: _____

New Dependents:

Name	SSN	DOB

Home Telephone: _____

Cell Phone: _____

Email: _____

State Income Tax -Did you live or work in another state other than your home state? Y___ N___

Dates of Residence:	ST # 1		ST #2	
Spouse Date if diff:	ST # 1		ST #2	

Miller Block Building

165 5th St SE

Pine City, MN 55063

Tel (320) 629-4745

Fax (516) 941-0225

email todd@toddstaxservice.com

Cell (612) 242-5713 texts ok.

Do you have?
Roth IRA

529 Plan Educa

401K or other retire pl

HSA

Credit card debt?

INCOME CHECKLIST

<input type="checkbox"/>	Wages	W-2
<input type="checkbox"/>	Unemployment	1099-G
<input type="checkbox"/>	Interest	1099-INT
<input type="checkbox"/>	Gambling	W-2G
<input type="checkbox"/>	Self Employment	1099-MISC
<input type="checkbox"/>	IRA/ 401K Distribution	1099-R
<input type="checkbox"/>	Other - please specify:	
<input type="checkbox"/>	Foreign Accounts?	
<input type="checkbox"/>	Open IRS Issues?	
<input type="checkbox"/>	HSA Distribution (Form 1099SA)	
<input type="checkbox"/>	Form 1095-A from Health Exchange	
<input type="checkbox"/>	Forms 1095 -A,B or C (Health)	

DEDUCTION /CREDIT CHECKLIST

Check all that apply - include docments or show on reverse side of checklist.

<input type="checkbox"/>	Medical Bills - see reverse	
<input type="checkbox"/>	Mortgage Interest	
<input type="checkbox"/>	Property Taxes	
<input type="checkbox"/>	Contributions	
<input type="checkbox"/>	Work Related Expenses	No longer deductible
<input type="checkbox"/>	Tuition	
<input type="checkbox"/>	Casualty/Theft Loss	
<input type="checkbox"/>	Daycare expenses	
<input type="checkbox"/>	Student Loan Interest	
<input type="checkbox"/>	Auto Tax (Tabs)	
<input type="checkbox"/>	State:	
<input type="checkbox"/>	Minnesota K-12 School	
<input type="checkbox"/>	Wisconsin Rent/Prop Tax Paid	
<input type="checkbox"/>	WI Rent - Heat Paid?	Y___ N___

