O'NEIL & STEINER, PLLC
CHECKLIST FOR TAX RETURN PACKETS

- Engagement Letter: Download and complete the engagement letter for your marital status (red buttons) on our tax documents page. If one or more of the standard election statements don't accurately reflect your circumstances & preferences please also download and complete the Non-Standard Elections form (blue button).

- Information Changes: Alert your preparer with notes regarding changes to your marital status, dependents/household members, bank account for direct deposit of refunds, mailing address, telephone, email address, etc..

- Complete Tax Packet: Review your records and consider activity for the prior year to determine if you have the following included in your packet:

    - Income Forms: Do you have all the forms W-2, 1099-Int, 1099-Div, 1099-B, 1099-R, 1099-G, 1099-Misc, SSA-1099, Schedules K-1, etc. you expected for the year? Have you reviewed and recorded income not reported to you on tax forms (rental income, self-employed income, alimony, etc.)?

    - Deductions: Have you reviewed and recorded total amounts paid for deductible items (medical expenses, real estate taxes, sales tax on the purchase of vehicles/boats, vehicle license portion of auto registration, cash charitable donations, non-cash charitable donations, etc.)? Have you reviewed the returning client organizer and prior year returns to identify potential missing items specific to your circumstances (teacher deductions, IRA and/or HSA contributions, alimony paid, etc.)?

    - Organizers: Did you use and/or review the organizers available for self-employed income, rental property, home office expenses, college expenses, vehicle mileage recap, and cancellation of debt income?

- Tax Credit Contributions: Have you decided how to direct your AZ tax dollars through use of the AZ Tax Credit programs for 2018? Please see our AZ Tax Credit Info on the dedicated tab of our website or review the AZ Tax Credit Info Sheet. If you plan to make AZ Tax Credit contributions between now and the April 15th deadline please be sure to list the recipient organization and dollar amounts with your return information. Mark the last column to indicate made in 2019.

- Retirement/Health Savings Contributions: If you plan to make a tax-deductible contribution to your Individual Retirement Account (IRA)/Health Savings Account (HSA) prior to the April 15th deadline please communicate the amount and type of account. (Traditional, Roth, HSA, etc.)

By submitting a complete tax packet you reduce the need for your CPA to seek additional information and/or forms. You not only will contribute to a more efficient system (you get your returns completed faster), but also reduce the time necessary to prepare your return, keeping your preparation fees to a minimum based on your circumstances.