TAX CHECKLIST

Please check the items that you have, indicate those that don't apply (NA), circle yes or no, and answer questions.

1	Estimated Tax Payments - please bring cancelled checks or payment date and amount	______
2	Signed Engagement Letter	______
3	If we provided you with a Tax Organizer, complete to the best of your ability	______
4	W-2s - Wage and Withholding Statements	______
5	1099's - Non-Employee Compensation, Interest, Dividends	______
6	K-1s & all documentation received from Partnerships, "S" Corps, and/or Trusts & Estates for 2018	______
7	1099-R - Pension. First year pension & annuities should bring letters from Trustees showing tax treatment and contributions	______
8	Please Provide total of IRA Contributions for 2018	______
9	1099-B - Proceeds from Sale of Stock	______
10	Date purchased and your cost of stock sold-to the best of your ability	______
11	Escrow Statements on all Land Transactions including Purchases, Sales & Refinancing that occurred during 2018	______
12	Copy of documents for automobiles purchased in 2018	______
13	Information on Purchase Date and Original Cost plus Improvements on Property Sold	______
14	Did you take advantage of a tax credit related to the purchase of a home in 2008, 2009 or 2010?	**yes no**
15	Copies of any Divorce Decrees and/or Property Settlement Agreements	______
16	Police Reports & Insurance claims for all Casualty and/or Theft Losses	______
17	Information on Basis or Cost of Items Stolen or Damaged and Date Acquired	______
18	NEW CLIENTS - bring copies of last two years' tax returns-three if possible	______
19	Written list of questions you would like addressed	______
20	Proof of any Charitable donations - See reverse	**yes no**
21	Documentation of Travel & Entertainment expenses - See reverse	**yes no**
22	Provide 1098-T, If you paid tuition and want to claim a tax credit. Please indicate if the student has had any felony drug convictions.	**yes no**
23	If you paid tuition and want to claim a tax credit, please indicate whether or not the GI bill or any other form of military tuition assistance was used.	**yes no**
24	If applicable, would you like information for payment of your Federal Tax Liability with your credit card?	**yes no**
25	If applicable, would you like Direct Deposit for your Federal & State Tax Refund? (attach voided check)	**yes no**
26	Or if you had direct deposit last year, has your bank account information changed? (If yes, Attach voided check)	**yes no**
27	Have you named and/or updated beneficiary designation forms for retirement and insurance plans recently? (Even if your life situation has not changed, the situation of your financial institution may have.)	**yes no**
28	Do you have a will? Yes No Last Updated?	______
29	Do you have a Living Trust? Yes No Last Updated?	______