# TAX CHECKLIST

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

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|---|---|---|
| 1 | Estimated Tax Payments - please provide cancelled checks or date and amount of payment. | ________ |
| 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 2019 | ________ |
| 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 2019 (Form 5498) | ________ |
| 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 2019 | ________ |
| 12 | Information on Purchase Date and Original Cost plus Improvements on Property Sold | ________ |
| 13 | Copy of documents for automobiles purchased in 2019 | ________ |
| 14 | Written list of questions you would like addressed | ________ |
| 15 | Copies of any Divorce Decrees and/or Property Settlement Agreements | ________ |
| 16 | NEW CLIENTS - provide copies of last three years' tax returns | ________ |
| 17 | Did you take advantage of a tax credit related to the purchase of a home in 2008, 2009 or 2010? | **yes no** |
| 18 | Proof of any charitable donations - See reverse | **yes no** |
| 19 | Documentation of travel expenses - See reverse | **yes no** |
| 20 | 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** |
| 21 | If you paid tuition and want to claim a tax credit, please indicate whether or not a GI bill or any other form of military tuition assistance was used. | **yes no** |
| 22 | If applicable, would you like your tax liabilities electronically withdrawn from your account? (If yes, attach voided check) | **yes no** |
| 23 | If applicable, would you like your 2020 estimated tax liabilities electronically withdrawn from your account? (If yes, attach voided check) | **yes no** |
| 24 | If applicable, would you like Direct Deposit for your Federal & State Tax Refund? (If yes, attach voided check) | **yes no** |
| 25 | Or if you had direct deposit last year, has your bank account information changed? (If yes, attach voided check) | **yes no** |
| 26 | 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** |

| | | | | |
|---|---|---|---|---|
| 27 | Did you receive or pay alimony? | **Yes No** | Date of original divorce decree? | ________ |
| 28 | Do you have a will? | **Yes No** | Last Updated? | ________ |
| 29 | Do you have a Living Trust? | **Yes No** | Last Updated? | ________ |