

TAX ASSISTANCE CHECKLIST

Items that need to be included with your filled-in tax questionnaire:

Just go down this list, marking any items that apply to you. Then, before you send in your tax questionnaire to us, you'll have a handy list of what to include with your filled-out form.

- A copy of your tax return from last year, if it was prepared by someone other than our firm.
- Your employment W-2.**
- Your spouse's W-2** from employer(s).
- Your 1099** if any.
- Your spouse's 1099** if any.
- Form 1099(s)** which you received from each bank or other company for **interest** they paid to you.
- Form 1099(s)** which you received from each bank or other company for **dividends** they paid you.
- Copy of the letter your church sent which verifies the total amount of your contributions.
- Any **Forms K-1** you received from partnerships or other investments.
- Please send the **Form 1099-R** or **Form W-2P** which you received for your **Pension(s)** or **Annuity(ies)**.
- The **Form 2441 Child Care Credit Worksheet**, if you filled it out.
- The "**Schedule C**" form, if you filled it out.
- The **Home Office Form**, if you filled it out.
- The "**Schedule D**" form, if you filled it out.
- The **Installment Sale Worksheet**, if you filled it out.
- The "**Schedule E**" form, if you filled it out.
- Please include copies of any IRS notices you have received during 2017.
- The "**Form 8283**" **Worksheet**, if you filled it out.
- Please include a copy of your **re-financing settlement statement** from the bank, if you re-financed your home in 2017.
- The "**Moving Expenses**" **Form**, if you filled it out.

The "**Form 2119 for Home Sale or Purchase**" **Worksheet**, if you filled it out.

The "**Vehicle**" **Worksheet**, if you filled it out. Please include "MILEAGE LOGS".

Please send us a copy of your **closing statement(s)**, if you bought a home in 2017.

Are you taking a tax return position that is aggressive, or where the facts are not conclusive? If so, fully disclose the facts and your position using a separate piece of paper. We will attach this to your tax return. This may head off penalties if you are later questioned by the IRS on this item.

ELECTRONIC FILING AUTHORIZATION (Form 8879): Upon completion of your return I will forward an encrypted copy for your review. If you want your return filed electronically, sign/date Form 8879 and FAX it to my office.

DO NOT email any documents that contain your personal information, especially document containing your Social Security Number unless you send it encrypted.

FEEL FREE TO EXCLUDE FROM YOU PACKET ANY PAGES OR DOCUMENTS THAT DO NOT APPLY.