2018 TAX PREPARATION CHECKLIST FOR TAX YEAR 2017

INFORMATION REQUIRED TO COMPLETE INCOME TAX RETURNS, if applicable to you:

* Social Security Number for husband and wife, if married, and all dependents, along with Date of Birth for each one.
* Driver’s License or official picture identification card, expiration date, issue date, and state if other than Alabama
* Bank Account Number and Routing Number if you plan to use direct deposit for your refund
* All Income Statements:
  + Wage Statements – W-2
  + 1099 Statements
  + Unemployment Income Statement
  + Social Security Statements
  + Pension or Retirement Income Statement – 1099R
  + Any other documents related to income
* Health Coverage Documentation (1095 A, B, C) and the months without health coverage, if any
* Interest and Dividend Statements - 1099
* Sale of Stocks and Bonds - 1099
* Mortgage Interest - 1098
* Home Equity Loan Interest - 1098
* Real Estate Taxes Paid
* Rental Income and Expenses
* Personal Property Taxes Paid – Tag Taxes
* Charitable Donations
* Casualty or Theft Losses
* Medical Expenses: doctor/eye doctor/dental
* IRA Contributions
* Sales or Purchase of Property – 1099B
* Moving Expense
* Child care expenses: Provider’s Name, Address, Tax ID, and Amount Paid
* Tuition and Education Fees – 1098T
* Student Loan Interest
* Estimated Taxes Paid
* Alimony either paid or received
* Lottery or Gambling Winnings
* Unreimbursed Employment Related Expenses
* Job Related Educational Expenses
* Self-employed or have ownership in a Business or Farm: Include all documents related to income and expenses for that business for the entire tax year.
* Foreign Bank Account Information

Standard Mileage Rates:

* Medical Travel: 17 Cents per Mile
* Business Travel: 53.5 Cents per Mile
* Volunteer Work: 14 Cents per Mile

NOTE: Previous Year’s Federal and State Tax Return, if you did not file with our office last year.