

2017 Checklist of items to bring to your tax preparation appointment at Allied Accounting Services, Inc.

- ___ W-2 forms for this year
- ___ 1099-R forms for Pensions received
- ___ 1099-G forms for Unemployment or State and Local Income Tax Refunds
- ___ 1099-MISC for any other income
- ___ 1099-SS or RRB for Social Security or Railroad Retirement
- ___ 1099-Int for Interest income statement
- ___ 1099-Div for Dividends income statement
- ___ 1099-B for proceeds from Brokerage statement & Annual Statement
- ___ W-2G for Gambling or Lotto Winnings & documentation of losses
- ___ Schedule K-1's from Partnership, S-Corp or Trusts
- ___ Alimony Received or Paid
- ___ Jury Duty Pay
- ___ Child Support Received
- ___ IRA, SEP or HSA Contribution amounts
- ___ Homeowners: 1098 Forms for Mortgage Interest
- ___ Property Tax Bills including assessed value
- ___ Renters: Name & address of landlord and Rent paid
- ___ Vehicle and motorcycle registration amount paid
- ___ Medical, Medicine, Dental, Eye Care or RX Expenses including mileage, lodging and health insurance cost (If Expenses exceed 10% of Income)
- ___ Contribution receipts showing value of cash or items donated
- ___ Volunteer mileage and supply costs
- ___ Unreimbursed job related expenses (union dues, safety & protective clothing, tools & travel, number of days out of town & location)-Mileage log
- ___ Job seeking expenses including mileage log
- ___ Educator Supply Costs
- ___ Student loan interest paid
- ___ Tuition and education expenses for you or your dependent and student level of college (freshman, sophomore, etc.) Including Form 1098-T
- ___ Child care provider name, address and Tax ID or SS#
- ___ Social Security numbers and birthdates of dependents and spouse
- ___ Self-employed: See the **2017 Checklist for Self Employed Individuals**
- ___ Farm income and expenses if applicable
- ___ Rental home: Income and expenses if applicable
- ___ Military Reservist or National Guard travel expenses
- ___ Settlement Statements for Home Sales (Michigan only) if applicable
- ___ Forms 1095 A, B or C regarding health insurance premiums or verification of health premiums paid and subsidy if any given
- ___ Estimated income tax paid to Federal or State and dates paid
- ___ Bank Routing & account number for direct deposit refund option
- ___ Copy of last 2 years of tax returns (New Clients)
- ___ HSA, or flex plan distribution Forms 1099-SA
- ___ Copy of Driver License(s)*

We are asking that you please include your email address. We are looking to move to electronic mailings in the future.