# AMERITAX PLUS

# TAX APPOINTMENT CHECKLIST

Please bring the following information for everyone on your tax return (spouse & dependents).

## PERSONAL INFORMATION

If you are new to AMERITAX PLUS or there has been a change in family status or bank accounts since your last visit bring the following. We will have this information on file for returning clients with no changes.

- ☐ Social Security number
- ☐ Last year's tax return
- ☐ Bank account & routing numbers (or a voided check) if you want direct deposit for your refund

## EMPLOYMENT

- ☐ W-2s
- ☐ 1099-MISC for self-employment or contract work

## EDUCATION

- ☐ 1098-E for student loan interest paid
- ☐ 1098-T for qualified tuition & related expenses

## INVESTMENT & BUSINESS INCOME

- ☐ 1099-INT for interest income *
- ☐ 1099-DIV for dividend income *
- ☐ 1099-B for sales of stocks, bonds, & mutual funds *
- ☐ Form K-1 for income from businesses, trusts, & estates

## PROPERTY & VEHICLES

- ☐ 1098 for mortgage interest paid
- ☐ Property tax statements & amount paid
- ☐ Closing documents if you bought, sold, or refinanced in tax year
- ☐ Amount paid for vehicle registration

## RETIREMENT INCOME

- ☐ 1099-R for income from IRAs, pensions, & annuities *
- ☐ 1099-SSA and/or RRB-1099 for social security benefits received

## RETIREMENT SAVINGS

- ☐ Amount contributed to traditional & Roth IRAs & all retirement fund rollovers *

* If you are also a client of **Raymond James**, we will have access to your records in our office; you therefore do not need to bring your 1099s related to your **Raymond James** investment and/or retirement savings & income.

## HEALTHCARE

- ☐ 1095-A, B, or C for coverage provided by your health insurer(s)
- ☐ Amount paid for medical expenses (insurance, doctor visits, prescriptions)
- ☐ Heath Savings Account (HSA) contributions & withdrawals

## OTHER INCOME

- [ ] 1099-C for cancellation of debt
- [ ] 1099-G for prior year state & local income tax refunds
- [ ] 1099-G for unemployment compensation
- [ ] W-2G for gambling income
- [ ] Amount of alimony received
- [ ] Rental income & related expenses
- [ ] Foreign income and/or foreign financial account information

## OTHER EXPENSES or DEDUCTIONS

- [ ] Receipts for contributions to charity
- [ ] Amount paid for child care (also provider’s name, address, & tax ID number)
- [ ] Amount paid for alimony & recipient’s Social Security number
- [ ] List of unreimbursed employee expenses (such as uniforms, equipment, union/professional due)
- [ ] Costs incurred from moving more than 50 miles (including transportation & storage)
- [ ] Total cost of classroom supplies paid for in tax year by educators
- [ ] Amount of gambling losses
- [ ] Amount paid & dates for estimated payments of federal, state, & local taxes


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For more information and tax planning resources, visit us at:

AmeritaxPlus.com

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