2016 Income Tax Document Checklist

Please provide us with the following documentation/information during your tax appointment or include them if mailing to the office.

The existence of any/all documents will depend on your particular tax situation.

NEW

1095-A
1095-B
1095-C

** These contain information regarding your health insurance premiums and will be provided to you by your health insurance company.

FORM	(X)	DESCRIPTION
W-2's	______	From all employers and copy of your last pay stub
W-2G	______	Gambling winnings
1099-INT	______	Interest income from banks, insurance companies, & financial institutions
1099-DIV	______	Dividend income from banks, corporations, and financial institutions
1099-B	______	Stock sales & hedging gains/losses
1099-C	______	Debt Cancellation
1099-K	______	Payment Card and Third Party Network Transactions
1098-E	______	Interest paid on college loans
1099-G	______	State tax refunds, unemployment, USDA, and other government payments
1099-MISC	______	Rent received, custom work, **crop insurance proceeds, prizes
1099-PATR	______	Patronage Dividends
1099-R	______	IRA, pension and annuity distributions
1099-S	______	Proceeds from Real Estate Transactions
1099-SSA	______	Social Security benefit statements
1098-T	______	College tuition statements
1098	______	Mortgage interest on a house, farmland or other property
K-1 Schedules	______	Partnerships, S-Corporations, LLC's, Estates and Trusts
1099-SA	______	HSA Distributions
Other:	______	Energy Credit Documentation
	______	Real Estate Tax Statements for taxes paid
	______	Closing Statement on Sale of Personal Residence
	______	Sales Tax paid on purchases of Autos, Boats, Planes & Motorcycles
	______	Contributions to SEP, IRA, SIMPLE Plans, and HSA's
	______	Birth date & Social Security card for any new dependents for year
	______	Daycare providers name, address, social security number and amount paid
	______	Dated invoices of all major purchases or sales (equipment & investments)
______	______	E-mail addresses for communication purposes
______	______	Cell phone number, if available

** Please bring in **ALL** documents pertaining crop insurance proceeds

NOTE: We have worksheets in our office & published on our website to help you prepare for your upcoming appointment. Some of these include Farm, Self-Employed Business Operations, Itemized Deductions, Rental Income & Expenses, and Daycare & Home Office worksheets.