

M & A Accounting & Tax Services, P.C.

2017 Federal Income Tax Checklist

Filing Deadline: April 16, 2018

Personal Information of all Family Members (For New Clients)

- Copy of Prior Year Tax Return(s)
- Date of Birth(s)
- Name(s)
- Address
- Social Security Card(s) (or prior year tax return)
- Banking Information (Direct Deposit Clients)

Income Statement

- W-2 Form(s)
- 1099 Form(s)
- Bank Interest (Form 1099-INT or 1099-OID)
- Dividends Earned (Form 1099-DIV)
- State/Local Refund or Payment (Form 1099-G)
- Alimony Received
- Rental Property, Business Income (Partnership, S Corp or Sole Proprietorship)
- Pension and/or IRA Distributions
- Unemployment compensation (Form 1099-G)
- Social Security Benefits (Form SSA-1099)
- Jury Duty Pay Records
- Gambling winnings (or loss) statements (W-2G)
- Other Income

Adjustments

- Educators Expenses
- Health savings account (HSA) deductions
- Moving Expenses (Moved at least 50mi for New Job)
- Self-employed Health Insurance
- Penalty on Early Withdrawal on Savings
- Alimony Paid
- IRA Deductions
- Student Loan Interest (Form 1098-E)
- Tuition and Fees

Itemized Tax Deductions

- Medical and Dental Expenses (Must be at least 10% of Income)
- Property Taxes
- Automobile registration tabs
- Sales Tax Paid (Car/Motor Home/Boat, etc. Major Purchases)
- Home Mortgage Interest (Form 1098)
- Closing Statement if Bought, Sold, or Refinanced Property
- Mortgage Insurance Premiums
- Charitable Donations
- Casualty or Theft (Not claimed against insurance)
- Unreimbursed Employee Expenses (i.e., Job Travel, Union Dues, Job Education)
- Tax Return Preparation Fees Cost of Tax Prep Software or Books
- Gambling Losses (only to the extent of your gambling winnings)

Tax and Credits

- Child and Dependent Care Expenses
- Tuition Statement, Room & Board, Books, Supplies Receipts (Form 1098-T)
- Retirement Savings Credit
- Residential Energy Expenses (Insulation Material, Exterior Windows/Doors, etc)
- Health Care Coverage: Premium Tax Credit /Exemption (Form 1095-A /1095-B/1095C)

Contact Me For Your Appointment At:

Leila Masri: (313) 718-0043