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### Year-End Tax Checklist

Your First & Last Name \_\_\_\_\_

Last 4 of SS# \_\_\_\_\_

Did you change your mailing address in 2016 Yes  No

If yes new address is: \_\_\_\_\_

Was there a change in your Family or filing status? Yes  No

If Yes please indicate Marriage  Divorce

Any additional children born in 2016 Yes  No

If Yes, please indicate: First Last Names, SS# and DOB, below.

For NY taxpayers only please provide Drivers License #, issue/exp Date \_\_\_\_\_

Did you and your dependents have health insurance entire year? Yes  No

Do you have signatory authority in a Foreign bank, investment or business accounts? Yes  No

Has your bank account changed from last year? Yes  No

If Yes, provide new routing/account number

Forms for 2016 (both spouses if applicable)	CHECK ALL THAT APPLY	# OF FORMS SUBMITTED
Wage Reporting: Form <b>W-2</b>	<input type="checkbox"/>	
Miscellaneous income including rent: Forms <b>1099-MISC</b>	<input type="checkbox"/>	
Partnership, S Corporation, & Estate Trust: <b>Schedules K-1</b>	<input type="checkbox"/>	
State and local income tax refunds: Form <b>1099-G</b>	<input type="checkbox"/>	
State Unemployment Compensation: Form <b>1099-G</b>	<input type="checkbox"/>	
Interest income statements: Form <b>1099-INT &amp; 1099-OID</b>	<input type="checkbox"/>	
Dividend income statements: Form <b>1099-DIV</b>	<input type="checkbox"/>	
Proceeds from Stock/Bonds/Securities: Form <b>1099-B</b>	<input type="checkbox"/>	
Retirement plan distribution and rollovers: Form <b>1099-R</b>	<input type="checkbox"/>	
Social Security Income: Form <b>1099-SSA, 1099-RRB</b>	<input type="checkbox"/>	
Payments for qualified education program: Form <b>1099-Q</b>	<input type="checkbox"/>	
Sale of your home or other real estate: Form <b>1099-S</b>	<input type="checkbox"/>	
Health Insurance Forms <b>1095-A, 1095-B, 1095-C</b>	<input type="checkbox"/>	
Health Saving Accounts and MSA: Form <b>1099-SA</b>	<input type="checkbox"/>	
Mortgage interest: Form <b>1098</b>	<input type="checkbox"/>	
Student Loan Interest paid Form <b>1098-E</b>	<input type="checkbox"/>	
Tuition Payments Statement Form <b>1098-T</b>	<input type="checkbox"/>	
Forgiveness of Debt Form <b>1099-C</b>	<input type="checkbox"/>	

Other forms not listed above list it here:

**Other Income**

INDICATE AMOUNT

Alimony received

Jury duty pay

Scholarships and fellowships

EXPENSES CHECK LIST

**All expenses/deduction MUST have supporting documentation (receipts, check, bill, letter, etc.) to support the deductions**

**Expense Data**

INDICATE AMOUNT

Adoption expenses

Alimony paid to former spouse

Casualty or Loss (Itemized deduction only)

Child care expenses (FSA) e.g. non-sleep summer camp, babysitter, nursery (provide Name, SS or Tax ID and address of the provider. ) Note both parents must work or seek employment.

Educational Exp. paid by cash/check not included in the Form **1098-T** (supplies, books, other school expenses)

Home improvements for Energy Efficiency (provide details of what was improved and each item's cost)

Donation to charity (Note that any single donations of \$250 or more needs to have an official receipt) Itemized deduction only

Gifts to charity, non-cash (clothing, other property) Include a detailed receipt of what was donated. Itemized deduction only

Job-hunting expenses (only between jobs) Itemized deduction only

Medical Expenses (paid out of pocket) Itemized deduction only

Moving expenses (over 50 miles, work related)

Expenses related to prizes and awards (lottery ticket, etc.)

Real estate taxes paid (if not included in mortgage payment Form **1098**)

Rent paid in 2016 (For NJ residents only)

H.S.A. (Health Savings Account) contribution by you during the year

Unreimbursed expenses related to your job (travel expenses, uniforms, union dues, subscriptions) Itemized deduction only

Estimated Tax Payments made to IRS (list dates and amounts)

1 \_\_\_\_\_, 2 \_\_\_\_\_

3 \_\_\_\_\_, 4 \_\_\_\_\_

Estimated Tax Payments made to State (list dates and amounts)

1 \_\_\_\_\_, 2 \_\_\_\_\_

3 \_\_\_\_\_, 4 \_\_\_\_\_

Contributions to: IRA (individual retirement accounts)

**Please sign X** \_\_\_\_\_

**Date X** \_\_\_\_\_