

**2018 TAX PREPARATION CHECKLIST FOR TAX YEAR 2017**

**INFORMATION REQUIRED TO COMPLETE INCOME TAX RETURNS, if applicable to you:**

- Social Security Number for husband and wife, if married, and all dependents, along with Date of Birth for each one.
- Driver's License or official picture identification card, expiration date, issue date, and state if other than Alabama
- Bank Account Number and Routing Number if you plan to use direct deposit for your refund
- All Income Statements:
  - Wage Statements – W-2
  - 1099 Statements
  - Unemployment Income Statement
  - Social Security Statements
  - Pension or Retirement Income Statement – 1099R
  - Any other documents related to income
- Health Coverage Documentation (1095 A, B, C) and the months without health coverage, if any
- Interest and Dividend Statements - 1099
- Sale of Stocks and Bonds - 1099
- Mortgage Interest - 1098
- Home Equity Loan Interest - 1098
- Real Estate Taxes Paid
- Rental Income and Expenses
- Personal Property Taxes Paid – Tag Taxes
- Charitable Donations
- Casualty or Theft Losses
- Medical Expenses: doctor/eye doctor/dental
- IRA Contributions
- Sales or Purchase of Property – 1099B
- Moving Expense
- Child care expenses: Provider's Name, Address, Tax ID, and Amount Paid
- Tuition and Education Fees – 1098T
- Student Loan Interest
- Estimated Taxes Paid
- Alimony either paid or received
- Lottery or Gambling Winnings
- Unreimbursed Employment Related Expenses
- Job Related Educational Expenses
- Self-employed or have ownership in a Business or Farm: Include all documents related to income and expenses for that business for the entire tax year.
- Foreign Bank Account Information

**Standard Mileage Rates:**

- Medical Travel: 17 Cents per Mile
- Business Travel: 53.5 Cents per Mile
- Volunteer Work: 14 Cents per Mile

**NOTE:** Previous Year's Federal and State Tax Return, if you did not file with our office last year.