2017 Tax Preparation Checklist

To help you get ready for your 2017 tax preparation, we have created a checklist of important information to gather and bring to your appointment.

McALLISTER KITTELL REED
CPAs & ADVISORS

FIRST NAME

LAST NAME

PHONE

EMAIL

ADDRESS Street City State Zip

Personal Information

- ☐ Name
- ☐ Date of Birth
- ☐ Social Security Number
- ☐ Bank Account Info

Income History

- ☐ Copy of 2016 Tax Return
- ☐ W-2 for 2017
- ☐ 1099
- ☐ Business Profit & Loss Statement (if applicable)
- ☐ Rental Property Profit & Loss Statement (if applicable)

Adjustment to Your Income

- ☐ Student Loan, Form 1098-E
- ☐ Moving Expenses
- ☐ Retirement Plan Contributions
- ☐ Educator Expenses
- ☐ Health Insurance Premium Payments (if self-employed)

Tax Deduction and Credit Information

- ☐ Mortgage Interest Summary, Form 1098
- ☐ Medical Expenses for 2017
- ☐ Child Care Costs
- ☐ Tuition Expenses, Form 1098-T (College)
- ☐ Charitable Contributions, Cash & Non-Cash
- ☐ Unreimbursed Work Expenses: Uniform/s, Travel and Continuing Education

Tax Payment Records

- ☐ Property Taxes Paid
- ☐ Estimated Taxes Paid (if Self-Employed)
- ☐ Record of Taxes Withheld for Retirement, Form 1099-R

Contact Us to Schedule an Appointment!

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