

## Tax Year 2018 Appointment Checklist

Taxpayer: \_\_\_\_\_ Spouse: \_\_\_\_\_

**Please inform your preparer of changes to marital status, contact information, or dependents.**

### IRS PIN

- Taxpayer \_\_\_\_\_
- Spouse \_\_\_\_\_

- Long-Term Care Insurance
- 529 College Saving Plan Contributions
- Tax credits – 50% of donations

### INCOME

- Form W-2 Wage Income
- Form 1099-DIV Dividend Income
- Form 1099-INT Interest Income
- Form 1099G State Tax Refund
- Form 1099G Unemployment Benefits
- Form 1099-MISC Self-Employment
- Alimony Paid or Received
- Gifts of \$15,000 or more
- Form 1099(R) Retirement Income - IRA, Pension, Annuity, Insurance payments
- Form 1099-SSA Social Security Benefits
- Form 1099(B) Mutual Fund & Stock Sales
- Cost Basis for Investments Sold
- Form W-2G Gambling Winnings
- Form -C Canceled Debt
- Rental Real Estate Property
- K-1 Forms from Partnerships, 1120S Corporations, Trusts, & Estates

### ITEMIZED DEDUCTIONS

- Medical Expenses over 10% AGI; Co-pays, Deductible, Doctor, Dentist, Glasses
  - Personal Property Tax Paid
  - Real Estate Tax Paid
  - Sales tax – Cars, Boats, Motorcycles, RV
  - Form 1098 - Mortgage Interest Paid & Mortgage Insurance Premiums
  - Charity paid by check or credit card
  - Noncash Charity – use thrift store value
  - Home Sale/Purchase/Refinance
- Bring Settlement Statements
- Gambling Losses

### EDUCATION

- Student Loan Interest
- Teacher classroom expenses (K to 12th)
- Form 1098-T for College Tuition
- Receipts for books
- Form 1099-Q 529 Plan Distributions

### OTHER CREDITS & DEDUCTIONS

- Child Care Expenses - Need provider's name, address, and tax ID number
- IRA Contributions – Traditional, Roth
  
- Form 5498-SA HSA Contributions
- Form 1099-SA HSA Distributions
- Healthcare Insurance 1095A -Marketplace  
1095B - Insurer, 1095C - Employer

### MISSOURI DEDUCTIONS

- Medical Ins. – Supplemental, Health, Rx