

Information Needed For 2017 Tax Return

- Copies of Drivers Licenses or Photo ID Cards (for new clients only). Originals or copies of social security cards and dates of birth for taxpayer, spouse and dependents (new clients & new dependents only).
- Prior year returns - at least 1 year (new clients only)
- W-2 & 1099 forms (wages, unemployment compensation, interest, dividends, etc.)
- Pension, Annuity, Social Security & IRA Information:
 - ◇ 1099 forms (1099-R for Pensions; SSA-1099 for Social Security; RRB -1099 for Railroad retirement income)
 - ◇ IRA contributions and conversions (Traditional and/or Roth)
 - ◇ Keogh, SEP or SIMPLE contributions
- Capital Gain Information:
 - ◇ 1099-B forms for sale of securities through a brokerage
 - ◇ Basis and date of purchase for securities on 1099-B forms
 - ◇ Relevant documentation for any other property sold
- Homeowner Information:
 - ◇ Closing statement for home sold during 2017
 - ◇ 1099-S form (proceeds from sale of house)
 - ◇ Closing statement for home purchased during 2017
 - ◇ Refinancing statements, if any
 - ◇ 1098 forms from banks, mortgage companies, etc. (interest paid on mortgage)
 - ◇ Real Estate taxes paid
- Other Income Information:
 - ◇ Royalty, Partnership, Trust or S-Corp. income (K-1 forms)
 - ◇ W-2G for gambling winnings; related losses
 - ◇ State & local income tax refunds (1099-G forms)
 - ◇ Alimony received along with social security number and name of payer
 - ◇ Unemployment income forms (1099-G)
- Business Income & Expenses:
 - ◇ 1099-MISC Forms
 - ◇ Advertising
 - ◇ Cell phone, telephone, internet
 - ◇ Computers, fax machines, printers, copiers
 - ◇ Contract labor
 - ◇ Insurance: liability & professional premiums
 - ◇ Meals & entertainment
 - ◇ Mileage (total miles driven and business miles number or % related to business)
 - ◇ Office supplies
 - ◇ Professional fees
 - ◇ Rent or in-home office expenses (see deduction information below for details)
 - ◇ Repairs & maintenance
 - ◇ Trade show costs
 - ◇ Travel, tolls, lodging, parking
 - ◇ Other direct operating expenses

- Rental income & expenses:
 - ◇ Rent collected
 - ◇ Advertising
 - ◇ Travel & mileage to inspect/maintain property
 - ◇ Commissions, management fees
 - ◇ Insurance
 - ◇ Association dues
 - ◇ Mortgage interest
 - ◇ Repairs
 - ◇ Pest Control, lawn care, pool maintenance
 - ◇ Supplies
 - ◇ Property taxes, tangible taxes, local licensing fees
 - ◇ Utilities
 - ◇ Appliances & other major asset purchases
- Dependent information:
 - ◇ Name, date of birth, social security number (original or copy of social security card for new dependents)
 - ◇ Names, Tax ID's, and addresses of dependent care providers, amounts paid for each dependent
 - ◇ Income of dependents, if substantial
 - ◇ Documentation relevant to custody of children of divorced parents
 - ◇ Proof that children lived with you (medical or school record showing child's name and your address)
 - ◇ Form 1098-T for anyone attending college plus amounts paid for books, computers & fees
- Deduction & other tax information:
 - ◇ Major medical expenses, health insurance and LTC (nursing home insurance)
 - Health Insurance Marketplace Statement (form 1095-A)
 - Health Coverage (form 1095-B)
 - Employer-Provided Health Insurance Offer and Coverage (1095-C)
 - ◇ Alimony paid along with social security number and name of payee
 - ◇ Moving expenses related to a job relocation
 - ◇ Expenses related to investment income (margin interest, etc.)
 - ◇ Casualty losses, including insurance settlement information
 - ◇ State and local taxes
 - ◇ Real estate taxes paid
 - ◇ Sales tax paid for major home improvements
 - ◇ Purchase agreement for new vehicle, boat or RV
 - ◇ Job expenses not reimbursed by employer
 - ◇ Amount of prior year tax preparation fee
 - ◇ Charitable contributions
 - ◇ Student loan interest paid (form 1098-E)
 - ◇ Tuition, books & fees for any family member attending college (form 1098-T)
 - Has any credit been taken before? For how many years?
 - ◇ Purchase receipts related to certain solar power systems (eligible for energy – related credits)
 - ◇ In home office deduction
 - Total sq ft of house, total sq ft of room(s) used for office
 - Rent amount if not owned by the taxpayer
 - Purchase price and date of purchase
 - Mortgage interest & property taxes
 - Home owner's insurance & HOA fees if any
 - Furnishings, equipment, wall hangings, carpet
 - Utility bills: electricity, telephone, water, gas, cable, internet
 - Repairs & maintenance such as pest control, lawn care
- Amounts and dates of estimated payments paid to IRS for the year
- Any payments to IRS for prior years or as a result of audit resolutions
- Voided check, if direct deposit of your refund is desired

Peck Jenkins Kershner CPAs PA's 2017 Questionnaire – Ask us or follow this link to the questionnaire on our website:
<http://www.pjkcpa.com/forms>