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TAX MATERIALS CHECKLIST

- A signed **Engagement Letter** (or come early to complete one)
- A completed Questionnaire-pick one (or come early to complete one)
 - **Questionnaire for Retired taxpayers**
 - **Questionnaire for Students**
 - **Questionnaire for all others**
- Bank information for direct deposit
- New client?
 - Last year's tax return
 - Social security cards for taxpayer, spouse and all dependents
 - A photo id for either taxpayer or spouse
 - A complete **New Client Intake**

“Important Tax Information” Forms:

- W-2s
- 1099 Misc
- 1099 Int—Bank form showing interest paid to you
- 1099 Div and B—from your investment account if you have one
- Year-end statement from Social Security (with the pink boxes)
- 1099Rs if you received pension income or withdrew from your IRA.
- K-1s from Partnerships or Corporations
- K-1s from Trusts or Estates
- 1098T for any student AND a statement of account showing tuition billed and paid.
- 1098Q showing distribution from an Education Savings Plan.
- 1098 showing mortgage interest paid
- Other 1099s for income such as unemployment compensation or gambling wins
- 1095-A if you got your health insurance from the Exchange (Obamacare)
- 1099C or A if debt has been canceled or there has been a foreclosure
- Statements from Child or other dependent care providers. (Children 12 or under.)
 - Or a list of day care providers and day camps used so you can work or go to school.
 - Name
 - Address
 - Tax ID number
 - Total paid per child
- Your year-end pay stub or pension statement in case there are deductions not on your W-2 or 1099R

Income not reported on forms that you need to tell us about:

- Alimony received
- Child support received (if applying for VT property tax adjustment or renter's rebate)
- Tips not reported to your employer
- Hobby or odd job income
- Self-employment income not reported on 1099s
 - Use our forms to help:
 - [Schedule C Worksheet Full](#) or
 - [Schedule C Worksheet Short](#) if you have your own method of giving us your numbers such as QuickBooks reports
- [Rental Income](#)
- [Foreign source income](#)
- [Farm Income](#)

Deductions/Credits:

- Educational expenses for a student OTHER THAN TUITION:
 - Required books and supplies
 - Room and board—This only helps if IRA or 529 plan funds are used to pay for school.
- Gambling expenses if you had gambling income
- IRA Contributions already made
- Vermont—Renter's Rebate—bring Landlord Certificates and income of all household members
- Vermont—Property tax adjustment—Bring property tax bill
- New Hampshire—Property tax credit—Bring Property tax bill
- Estimated payments made including the dates paid
- The cost of some home energy improvements and renewable energy systems
 - Generally, we need the manufacturers certification that the item qualifies

Itemized Deductions: (these help only if they total more than the standard deduction--\$6,200 or \$12,400 if filing jointly)

- Mortgage interest
- Property taxes paid (**Vermont homeowners must bring their property tax bill.**)
- Charitable contributions of money. In order for a charitable deduction to be allowed:
 - You must have a receipt from the organization if you gave them more than \$250 and the receipt must state that you received no goods or services in exchange for the donation.
 - If under \$250 you must have either a receipt or your own bank records as proof.
 - The organization must be a 501(c)(3) charity (or church); **political donations are not deductible.**
- In kind Charitable contribution:
 - If you **donated stock**, please bring in the acceptance letter from the charity.
 - In order to claim a tax deduction for donating clothing, household goods or similar items, you must have a _____ receipt from the charity and an itemized description of the items donated with thrift store values you
 - assign.
 - **If you have a receipt from a charity that lists "2 bags clothing" without further details, it will be ignored.**
 - If the donated item has a value of **more than \$5,000 you must have an appraisal.**
 - If you purchased the item specifically for donation, a receipt is required.
 - If you put donations in the "yellow box" you still need to list the items and their value, there won't be a receipt. Maximum deduction is \$250.
 - There are special requirements for the donation of vehicles.