R&R ACCOUNTING SERVICE

2018 TAX PREPARATION CHECKLIST

- ☐ Social Security numbers of you and all of your dependents **(New Client & addition to the household)**.
- ☐ Last Year's Federal and State Tax returns **(for new clients)**.
- ☐ All W2's for you and all of your dependents.
- ☐ Form 1099 from your Bank(s) / Credit Union reflecting Interest Income.
- ☐ **Form 1095-A if you had Obama Care during 2018 Tax Year.**
- ☐ Stocks sold: Sales transaction documents from your Broker, and Purchase Statements.
- ☐ Statements of IRA Contributions, IRA Distributions or Rollovers.
- ☐ Form(s) 1098 from Banks/lenders' mortgages for the purpose of interest paid.
- ☐ If Real Estate is not impounded, provide property taxes paid in 2017 tax year.
- ☐ Settlement of closing statement if you purchased or refinanced any real estate.
- ☐ DMV Registration statement for 2018.
- ☐ Child Care payments, including child care provider ID and address.
- ☐ Sole Proprietor: All records, checks, transaction register, general ledger, and financial statements such as Balance Sheets and Income Statements.
- ☐ K-1 from your Partnership(s) or Corporation Investments.
- ☐ Student Loan and interest payment documents.
- ☐ Education expenses for you and any of your dependents. (form 1098-T)
- ☐ Cancelled check from your bank if you would like the IRS to credit your deposit/withdrawal taxes**.** **(RECOMMENDED THIS YEAR)**
- ☐ Projection figures for 2019, and your most Recent Paystubs for W-4 information.**)**
- ☐ Student Loan and interest payment documents.

R & R Accounting Service
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