

# WHAT TO BRING TO YOUR APPOINTMENT

## INCOME

YES N/A

W-2s

1099-R (Distributions from IRAs/401ks/other retirement accounts)

1099-INT (Interest Income) and/or 1099-DIV (Dividend and Capital Gain Income)

1099-B (Sale of Stocks/Mutual Funds) - Check to see if all sales have corresponding cost info

1099-MISC (Self Employment Income) - **FILL OUT BUSINESS INCOME/EXPENSE WORKSHEET**

1099-K (If you accept credit cards or Paypal from customers, your credit card company will issue this)

1099-G (Unemployment Received)

1099-SA Distributions from your HSA

1099-A/1099-C (Cancellation of Debt or Property Foreclosures)

K1 (Income from Partnership, Estate, Trust or S Corporation)

SSA-1099 (Social Security Income)

Alimony/Spousal Maintenance Received - **AMOUNT**

Rental Income - **FILL OUT RENTAL INCOME WORKSHEET**

Did you own or have signature authority over any foreign financial assets (bank, brokerage, etc...) during the tax year?

If yes, bring info on foreign investment income and max. account values during tax year

Did you receive any gifts or inheritance from foreign persons or entities during the year?

Do you have any other sources of income (bartering, hobbies, sales of property etc...)? If so, please bring information

## DEDUCTIONS/CREDITS

YES N/A

1098-T (Tuition Statement for College Education) **Please bring transcript showing actual tuition payments plus receipts for books/supplies.**

1098-E (Student Loan Interest Paid) - **NEW MN CREDIT!** See page 4 for details of what to bring.

1098 (Mortgage Interest Paid)

Did you buy, sell or refinance any property this year? **Bring all Settlement Statements / Closing Disclosure**

Charitable Donations - Bring receipts plus itemized list of non-cash items/values. Click [here](#) for online valuation

Proof that children live with you - Bring school, health records or other documents. This is for **ALL** dependents this year.

Quarterly Estimated Tax Payments - **Bring list of date and amount of each payment made**

1095-A, 1095-B and/or 1095-C (Proof of Health Insurance from government, insurance company, or employer, respectively)

Did your dependent have investment income? - Bring tax forms

All Adoption Papers and proof of expenses for Adoption Credit

MN Long Term Care Insurance & 529 plans - **Bring account numbers and amounts paid.**

MN K-12 Education Expenses - [Click Here](#) for eligible costs and bring itemized list

## OTHER IMPORTANT ITEMS

YES N/A

Signed Release of Exemption [Form 8332](#) if you are claiming a child that does not live with you

Signed 2018 Tax Preparation Agreement - **FILL OUT WORKSHEETS**

**For NEW clients:** Copy of last year's tax return

For Corporations: Year End Balances on all accounts and loans - If you have Quickbooks or other accounting software, email bookkeeping to your accountant before scheduling an appointment

Would you like to make a donation to the Nongame Wildlife Fund? **AMOUNT**

Prep. Initials