



2017 Personal Tax Memory Jogger

General Information

NEW THIS YEAR: We will need your spouse's email address to facilitate electronic signature

- If you did not send us last year's tax return, please send us the following information:
 - Full names and relationship of all family members
 - Social security numbers for all family members
 - Birthdays of all family members
 - Filing status - Married, Single, Head of Household etc.
 - Full address
- Estimated Payment Information (Dates and Amounts of each payment)

Income Items (as applicable)

- W2s received
- 1099s, 1098s, 1095s received (interest, dividends, capital gains, IRA withdrawals etc)
- K1s received
- Unemployment benefit statements
- Social Security benefit statements
- Alimony
- Rental property income documentation
- Other Business income
- Tax refunds from the State
- Documentation related to any other income received

Deduction Items (as applicable, but please feel free to ask about others that aren't listed here)

- Health Insurance status (were you covered all year?)
- Changes in dependents
- IRA/Retirement contributions
- Mortgage interest
- Charitable contributions (cash, miles driven, other donations, etc.)
- Medical expenses (including health insurance premiums)
- Real estate and other taxes
- Unreimbursed employee expenses (personal expenses paid for business, job search costs, uniforms, etc.)
- Child and dependent care expenses
- Questions about any other deductions

