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**HOLISTIC
FINANCIAL
PLANNING**

incorporating

**SOCIALLY
RESPONSIBLE
INVESTING**

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Securities offered through Cadaret,
Grant & Co., Inc. member FINRA/SIPC;
Hansen's Advisory Services and
Cadaret, Grant are separate entities.

CHECKLIST FOR 2017 TAX PREPARATION

To expedite the preparation of your taxes, please provide the following documents, as they apply to you (and Joint filer, if you file jointly). As you receive documents pertaining to your taxes, check the boxes and keep them with this list to bring to your appointment or include in your mailing to us.

<input type="checkbox"/>	Driver's License
<input type="checkbox"/>	Last year's tax return (if we did not prepare your taxes)

Income:

<input type="checkbox"/>	W2s and last 2017 pay stub
<input type="checkbox"/>	Pension statements
<input type="checkbox"/>	Social Security statement
<input type="checkbox"/>	Unemployment insurance statement
<input type="checkbox"/>	1099s (1099R, 1099DIV, 1099INT, 1099B* and any other 1099s)
<input type="checkbox"/>	K1s**
<input type="checkbox"/>	Rental Income
<input type="checkbox"/>	Self-Employment Income

Deductions:

<input type="checkbox"/>	1098s (Mortgage Interest, Tuition)
<input type="checkbox"/>	Real Estate Taxes
<input type="checkbox"/>	Medical and Dental Expenses, and HSA information (if applicable)
<input type="checkbox"/>	Charitable Contributions
<input type="checkbox"/>	Childcare expenses (provider's tax ID#, address)
<input type="checkbox"/>	2016 Tax Preparation Fee (if we did not prepare your taxes)
<input type="checkbox"/>	2017 Estimated tax cancelled checks (Federal/State), or list payments
<input type="checkbox"/>	Rental Expenses
<input type="checkbox"/>	Self-Employment Expenses
<input type="checkbox"/>	Employee Expenses
<input type="checkbox"/>	Education Expenses
<input type="checkbox"/>	Purchase or sale of residence records / Closing statements

Other:

<input type="checkbox"/>	Banking information for electronic refund and payment
<input type="checkbox"/>	1094 or 1095 ACA forms
<input type="checkbox"/>	Anything else you think may pertain to your taxes

* 1099Bs are usually received after February 15th, and **K1s after March 15th, so you should schedule your tax appointment accordingly if you are expecting these forms.