HANSEN'S
ADVISORY SERVICES, INC.
Investing in companies that give a hoot

2018 Tax Preparation CHECKLIST

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 bring to your appointment or include in your mailing to us.

BRING THESE

- ☐ Driver's License
  States now require these details for each taxpayer on the return. Bring a copy so we can complete your return without delay
- ☐ Last year's tax return
  If we did not do your taxes last year, bringing this will help us proceed more efficiently and accurately
- ☐ Banking Information
  Have your routing and account number to a bank account you'd like to use for electronic refund or payment

OTHER

- ☐ Anything else you think may pertain to your taxes
- ☐ 1095 Healthcare Coverages forms

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

INCOME

- ☐ W2s and last 2018 paystub
- ☐ Pension statements
- ☐ Social Security statements
- ☐ Unemployment insurance statements
- ☐ 1099s, R, DIV, INT, B* and any other 1099s
- ☐ K1s**
- ☐ Rental Income
- ☐ Self-Employment Income and Expenses

DEDUCTIONS

- ☐ 1098s, Mortgage Interest, Tuition
- ☐ Real Estate Taxes
- ☐ Medical and Dental Expenses, HSA information
- ☐ Charitable Contributions
- ☐ Childcare Expenses, provider's tax ID#, address
- ☐ 2018 Tax Preparation Fee if we did not prepare
- ☐ 2018 Estimated Tax payments
- ☐ Rental Expenses
- ☐ Education Expenses
- ☐ Real Estate purchase or sale records/closing

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