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January, 2018

Dear Taxpayer,

2017 CHECKLIST

Schedule early – appointments fill up fast. GO TO www.taxofficeforms.com to schedule your appointment and **download any checklists that may apply to your circumstances. CALL IF ANY PROBLEM**

Below is a partial list of general information and **original source documents** needed to prepare your **2017** Federal Income Tax Returns.
*Medical Expenses NOW have a 7.5% floor for ALL taxpayers for 2017 & 2018, made retroactive under The new Tax Reform Act

Affordable Care Act (Obama Care)-HOW MANY MONTHS WERE EACH INDIVIDUAL ON YOUR TAX RETURN COVERED BY A QUALIFIED HEALTH INSURANCE PLAN...DID YOU RECEIVE ANY SUBSIDIES THROUGH THE HEALTH EXCHANGE? **We need 1095-A or 1095-B or 1095-C Still here for 2017 & 2018 Penalty gone in 2019**

1 ☐**W-2 forms** from employers you worked for in 2017. **Bring final *pay stub for 2017 to check for possible deductions!***
2 ☐**1099-INT & 1099 DIV** from **banks, credit unions, brokerage firms**, for savings, CD's & dividends US Bonds ***BRING DOCUMENT***.
3 ☐ Alimony Received? PAID? *IF MARRIED OR DIVORCED PLEASE CHECK CURRENT NAME with **SOCIAL SECURITY records**.*
4 ☐1099 forms received for any other miscellaneous Business Income. Also, K-1's from business entities if you have an investment in one.
5 ☐SALE OF STOCK We need the **1099-B** and ask for **REALIZED GAIN LOSS REPORT** from broker or download from online site
6 ☐ Income from **1099R's**, any PENSION OR MILITARY RETIREMENT, 401(k), IRA. Did you receive a STATE Income Tax Refund?
7 ☐*Rental* properties: **Rents received & expenses paid**. Go to www.taxofficeforms.com to get a **Rental *worksheet*.**
8 ☐**Unemployment Statements** from the State paying the unemployment, 1099-G, or call 1 (775) 684-0444 TO GET AMOUNT for Nevada.
9 ☐**Social Security Benefits** form **(SSA-1099). Call 1 800 772-1213 IF YOU DON'T HAVE THAT STATEMENT, WE NEED IT.**
10☐**W-2G's** from **Gambling wins**. Total all wins and losses. *CALL CASINO OR TAVERN PAYER IF NOT SURE & VERIFY AMOUNTS!*
11☐ 1099-C OR 1099-A's for Cancellation of Debt from Credit Card Company, Mortgage Company or Finance Company, LOAN MODS!.
12☐**Actual Settlement Statement, NEW *Closing Disclosure* if you bought sold or refinanced a home, rental or raw land.**
13☐**IRA** contributions, Roth or Traditional, SEP, Simples, Rollovers and any ***annual fees charged if paid by separate check by you.***
14☐**Student loan interest**- Get 1098-E, Call **1 (888) 272-5543** Navient, Sallie Mae Servicing for Amount.
15☐College Level **Tuition PAID! BOOKS & FEES** for you, your spouse or dependent children. **Need 1098-T from School or Call School.**
16☐**Medical** insurance premiums paid. Other Medical Expenses Paid (co-pays, dentist, eye doctor, glasses and prescriptions). **Mileage?**
17☐**Sales Tax on Vehicles** is tax deductible only if you itemize, not available for those who take the standard deduction any longer.
18☐Car REGISTRATION TAXES you paid in **2017**, Call DMV@ 486-4368 with license plate# or go to **WWW.DMVNV.COM**
19☐Year End Mortgage statements **2017 Form 1098** showing mortgage **interest** and real estate taxes for 1st & 2nd Mortgages!
20☐***Interest*** PAID on special assessments, SID's OR LID's in Master planned Communities, City of LV, Henderson & County call **796-0082**
21☐Taxes and interest paid on land or vacation property or boats or RV's with sleeping, cooking and bathrooms.
22☐Mortgage Insurance Premiums are GONE
23☐ Investment Interest OR Income and Investment Expenses from all sources.
24☐**ALL DONATIONS** must be substantiated by cancelled check, $250 or more must have written ACKNOWLEDGMENT from Charity
25☐ DID YOU HAVE ANY THEFTS OR CASUALTY LOSSES IN 2017? ANY PONZI TYPE THEFTS?
26☐**Unreimbursed** employee business expenses Union dues & assessments, Tools, supplies, **auto mileage**, education expenses, business gifts.
27☐If you use your home or apt for any business purpose you may be eligible for additional write-off. **SIDE BUSINESS, MARY KAY etc.**
28☐**Child care costs paid.** Need **name, address, amount paid** and **Tax Id's (EIN or SSN)** of person or school. Try to get **receipt**.
29☐Energy Cr. ~~HVAC systems, Windows, Insulation, Roofing, Qualified Heaters~~, Solar, Electric Car Credits..*Bring* Manufacturer Certificate
30☐**List all Estimated (quarterly) taxes paid. (Bring cancelled checks) or call IRS at 1-800-829-1040** and ask how **much & date PAID.**
31☐**HAVE YOU ADOPTED OR ATTEMPTED TO ADOPT?**
32☐**NEW CLIENTS** PLEASE BRING THE LAST 3 YEARS FEDERAL INCOME TAX RETURNS.
33☐If you bought a new home & received the $7,500. 1st time home buyer credit, this is the 7th year to start the $500. per year PAYBACK.
34☐Did you lend someone money with a formal Promissory Note and they didn't pay it back? Let's review the Rules.
35☐If Electronically Filing your tax return **Copy of check REQUIRED or cancelled check for routing codes** to speed refunds

*************Do You Have Bitcoin**************

A WORD ABOUT PRIVACY......WE DON'T SHARE INFORMATION WITH ANYONE UNLESS YOU REQUEST US TO!

(Under Federal Law We Can No Longer Share Information with a Third Party Unless You Provide Us with WRITTEN CONSENT)

***Foreign bank or financial accounts greater than $10,000. are REQUIRED to be reported by 04/15/2018**
***Did you receive a check for Foreclosure Abuse from Mortgage Co between $300. & 125,000?**
***Be sure to double check to see if your** dependent children or retired **parents are required to file!**

CLIENT **MUST** CALL FOR AN EXTENSION IF NEEDED. (CAN NOW BE FILED ELECTRONICALLY)

PLEASE CALL IF YOU HAVE A **CHANGE OF ADDRESS**, AS WE NEED TO NOTIFY THE IRS TO PROTECT YOUR RIGHTS UNDER THE LAW

*PLEASE COME **PREPARED** SO THAT WE MAY **TAKE TIME** TO LOOK AT TAX SAVING MEASURES*