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Dear Taxpayer,

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2018 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 2018 Federal Income Tax Returns.
*Medical Expenses NOW have a 7.5% floor for ALL taxpayers for 2018. Next year's taxes 10% for EVERYONE.

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 2018, Penalty gone in 2019

- 1 W-2 forms from employers you worked for in 2018. **Bring final pay stub for 2018 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 Tuition PAID **Print 2018 account. BOOKS & FEES** for you, your spouse or dependent children. **Need 1098-T 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 Year End Mortgage statements 2018 Form 1098 showing mortgage interest and real estate taxes for 1st & 2nd Mortgages!
- 19 Car REGISTRATION TAXES you paid in 2018 **P 22**
- 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 EXPIRED, unless Congress goes back to work and adds it to a pending tax bill.
- 23 Investment Interest PAID ok, ~~Investment Expenses no longer deductible.~~
- 24 ALL DONATIONS must be substantiated by cancelled check, \$250 or more must have written ACKNOWLEDGMENT from Charity
- 25 THEFTS OR CASUALTY LOSSES IN 2018 suspended for 2018-2025. ANY PONZI TYPE THEFTS or Disaster Loss still OK
- 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 Nonbusiness energy property credit not available for 2018 unless extended, Solar, Electric Car Cr. **OK. Need 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 8th year for 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 04/15/2019**

***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

***ITEMS ABOVE CROSSED OUT ARE NO LONGER ALLOWED UNDER NEW LAW**