CHECK LIST of items needed for 2016 Tax Return Preparation:

- **FOR NEW CLIENTS ONLY**
  Copy of prior year Federal and State Tax Returns.
  Birthdates of taxpayer, spouse and children (MM/DD/YYYY).
  Any real estate refinance, sale or purchase paperwork (HUD-1) for transactions since 2003.
  Did you receive a $7,500 tax credit for a home purchased in 2008?
  List of credits claimed in the past for higher education expenses for each person.
  Have you received a federal energy credit for energy efficient building property in 2006 to 2013?

FOR ALL CLIENTS:
Please note: If you want to use the Intuit Link Portal, we can customize a list of items & questionnaires specific to you which may be a more efficient process for you in 2016.

Did you receive a Form 1095-A (Health Insurance Marketplace Statement, 1095-B (Health Coverage Form) or 1095-C (Employer Provided Health Insurance. Most everyone that has insurance will receive one of these forms

Also, just as in 2015; you'll need to tell us whether you and all of your dependents had health care coverage for the entire year. (If not, we will have some additional questions)

- Form W-2's (Employee Wage & Tax Statement)

- Settlement sheets (HUD1) for home purchases or refinances in 2016

- Receipt for any new energy efficient property purchased for primary residence in 2016 (HVAC, windows, doors, skylights, insulation, plug in hybrid or all-electric drive vehicles, ground source heat pumps, solar electric property, solar water heaters, wind energy property , fuels cells, microturbines, etc.) If you're not sure if something qualifies, make sure to bring documentation on the energy rating and a copy of the receipt.

- Record of Other Income
  Interest and dividends from savings institutions and brokerages (Forms 1099-INT, 1099-DIV)
  Stocks/Mutual Funds sales and purchases
  Pension or IRA distributions (Form 1099-R)
  Refund of State Taxes (Form 1099-G)
  Income from Discharge (1099-C)
  Education Distributions (1099-Q)
  Gross Receipt from Real Estate Sale (1099-S)

- Alimony received or paid

- Gambling income / prize winnings and related expenses

- Any debt cancellation, debt reduction or foreclosure in 2016? If so, we will need the amounts cancelled or reduced. Banks should send you a Form 1099-A and/or 1099-C.

- IRA (traditional, Roth or educational), SEP, SIMPLE, Solo 401K and KEOGH contributions

- Post secondary tuition and student loan interest (for yourself, spouse or children)

- Rental property income and expenses

- K-1's (Partnership, S-Corporation, Estates and Trusts)

- Real Estate Taxes and Personal Property Taxes

- Medical Expenses (significant and not reimbursed)

- Interest on residential mortgages (split out interest paid on first & second home and interest paid on investment property (i.e....a third home or vacant land))

- Private mortgage insurance payments made on qualified mortgage insurance issued in '09 Thru '16
- Charitable Contributions, cash and noncash (must have receipt or proof of payment)
- Tax preparation fees paid in 2016
- Safe deposit box fee
- Employee business expenses (unreimbursed)
- Job seeking expenses
- Job related moving expenses and moving reimbursement documentation
- Child care expenses and provider information (name, address and social security or federal ID number) and amount paid for each child
- 2016 tax returns prepared for children under the age of 18 or students under the age of 24
- (For Virginia Residents Only) Any payments made to the Virginia 529 College Savings Program, the VEST Program, the Prepaid Education Program or College Wealth
- (For Maryland Residents Only) Any payments made to the Maryland Prepaid College Trust or the Maryland College Investment Plan
- Estimated Tax Payments made for 2016 taxes (both federal and state) including dates paid
- Income and expenses from self employment
- Self Employed health insurance payments
- Sale of residence
  - Closing papers (HUD1) from sale of old residence
  - Refinance paperwork during period of ownership (if applicable)
  - Any Improvements made to old residence
- Small business memory jogger (Note: Only for small businesses or unreimbursed employee expenses)
  - Purchases of Equipment (new cell phone, printer, computer)
  - Leased Equipment
  - Rent (home and/or office)
  - Utilities
    Supplies: Printer Ink, stationary
  - Cell phone
  - Internet Connection
  - Mileage and/or actual auto expenses
  - Subscriptions/Memberships
  - Insurance
  - Advertising
  - Legal fees
  - Licenses
  - Tax prep fees (for prep of business return)
  - Repairs
  - Travel (hotel, tolls, airfare, and parking)
  - Wages/Commissions
  - Long Distance charges
  - 2nd home phone line

Don't delay. Schedule your appointment today.
Call us at 540-371-1133 or make your appointment online at
http://commonwealthbusinessservices.fullslate.com