

# KLEINHENZ & COMPANY, LLP

TAX • ACCOUNTING • ADVISORY

www.kleinhenzcpa.com

TAX AND BUSINESS ACCOUNTANTS  
FINANCIAL CONSULTANTS

## Year 2017 TAX INFORMATION CHECKLIST

Be sure to bring, mail, email or drop off the following information :

PA Dept of Revenue is requesting your PA Driver License Information to Combat ID Theft-This is Voluntary

- |   |  |
|---|--|
| <input type="checkbox"/> Forms 1095-A, B or C (Health Insurance Statement)                          | <input type="checkbox"/> Purchase or sale of residence (Settlement Sheets)           |
| <input type="checkbox"/> Social Security number(s) **   | <input type="checkbox"/> Medical and dental expenses                                 |
| <input type="checkbox"/> Dependents' Social Security numbers and DOB**                              | <input type="checkbox"/> Real estate and personal property taxes                     |
| <input type="checkbox"/> Wage statements/W-2(s)   | <input type="checkbox"/> State or local taxes paid                                   |
| <input type="checkbox"/> Self-employment business income and expense summary                        | <input type="checkbox"/> PA Use Tax to be reported                                   |
| <input type="checkbox"/> All 1099-MISC and/or 1099K Forms   | <input type="checkbox"/> Fed/PA/Local Estimated taxes paid                           |
| <input type="checkbox"/> Commissions received/paid  | <input type="checkbox"/> Charitable donations ( <u>Receipts Required</u> )           |
| <input type="checkbox"/> Pension, retirement income/1099-R  | <input type="checkbox"/> Mortgage or home equity loan interest/1098MTG               |
| <input type="checkbox"/> Unemployment income/1099-G   | <input type="checkbox"/> Unreimbursed employment-related expenses                    |
| <input type="checkbox"/> Canceled Debt Amount/1099-C  | <input type="checkbox"/> Job-related educational expenses                            |
| <input type="checkbox"/> Social Security income/SSA-1099  | <input type="checkbox"/> Educator expenses   |
| <input type="checkbox"/> IRA contributions-Traditional or ROTH                                      | <input type="checkbox"/> Tuition Paid/1098-T & <u>Billing/Payment Detail</u>         |
| <input type="checkbox"/> Statements on the sales of stocks or bonds/1099-B                          | <input type="checkbox"/> Student loan interest/1098-E                                |
| <input type="checkbox"/> Interest and dividend income/1099-INT/1099-DIV                             | <input type="checkbox"/> Moving expenses   |
| <input type="checkbox"/> Lottery or gambling winnings/losses/W-2G                                   | <input type="checkbox"/> Casualty or theft losses                                    |
| <input type="checkbox"/> State refund amount/1099-G   | <input type="checkbox"/> Child care expenses and provider information                |
| <input type="checkbox"/> Income and expenses from rentals   | <input type="checkbox"/> Receipt(s) for qualified energy efficient home improvements |
| <input type="checkbox"/> Alimony paid or received   | <input type="checkbox"/> Any Questions You May Have Please Write On A Separate Sheet |
| <input type="checkbox"/> Copy of Voided Check for Direct Deposit of Refund**                        | ** If Not Previously Provided  |
| <input type="checkbox"/> <u>Foreign Accounts Valued Over \$10,000.00</u><br><u>MUST BE REPORTED</u> | <u>All Items May Not Apply</u>   |

RECEIPTS MAY BE REQUESTED