

Tax Information Checklist

- Any changes in marital status or changing of your name
- Have you moved during the year or changed your address
- Dependent children, addition of newborns or children claiming themselves since they graduated from high school or college
- If you had any child care or preschool costs please list the amount paid to each provider for each child, the providers name, address, and Federal EIN Number or Social Security Number
- Do you have a child attending college in the upcoming year
- Are you making payments on Student Loans
- Have you made a contribution to a College Savings Plan
- Have you made a contribution to your Traditional or Roth IRA during the year
- Did you receive a distribution from a retirement account or annuity during the year. Have you completed a rollover or converted any IRA's to Roth IRA's during the year
- Have you purchased, sold, or refinanced a home or a second home
- At any time during the year was your personal home rented or used for business purposes
- Have you received any assets through inheritance. You may be eligible for a stepped up basis
- Did you receive or make a gift during the year
- Did you receive any other income that is not reported on a W-2, 1099, or any other tax reporting document which is not included in your business or farm income
- Are you able to itemize, complete the itemized deduction worksheet to determine if your out of pocket medical expenses, real estate taxes, state income taxes, motor vehicle taxes, house mortgage interest, investment interest, donations, and other itemized deductions exceed the standard deduction for the year. Please provide copies of sales tax receipts on large item purchases such as a vehicle purchase or ATV
- Do you have any foreign bank accounts or have a signatory authority over a foreign bank account
- During the year did you purchase or sell any investment property, stocks, or bonds
- Were any personal or business debts cancelled or forgiven during the year
- Provide a record of estimated tax payments made during the year, if any

- ___ Provide copies of your W-2's
- ___ Provide the following 1099 forms, this is not an all-encompassing list
 - ___ Interest
 - ___ Dividends
 - ___ Social Security Benefits
 - ___ State Tax Refunds
 - ___ Stock or Bond Sales
 - ___ Governmental Program Receipts
 - ___ Co-op or Patronage Dividends
 - ___ Contract Labor/Rent/Commissions
 - ___ Annuity or IRA Withdrawals
 - ___ Unemployment Compensation
- ___ Provide copies of any K-1's received reporting income/loss from a partnership, S corporation, trust, and/or estate
- ___ Completed worksheets for your business, rental property, or farm/ranch operation
- ___ Teachers – provide your total out of pocket classroom expenses for the year
- ___ Forms 1095A, 1095B, and/or 1095C for Health Insurance Verification
- ___ Record of contributions to your traditional and/or Roth IRA during the year
- ___ Form 1098-E or document reporting student loan interest paid during the year
- ___ Form 1098 mortgage interest paid for your home or second home
- ___ Closing statements relating to the purchase or sale of any real estate property
- ___ Form 1098-T from the college reporting tuition payments and copies of book receipts purchased during the year
- ___ Any tax notices received from the IRS or other taxing authorities
- ___ Divorce decrees, separation agreements, custody agreements and all other supporting documents you feel may be necessary

Specific to Farmers, Ranchers, and Small Business Owners

- ___ Copies of all employment forms (W-3, 941, 941N, 943, 944, 940, State unemployment)
- ___ Record of payroll tax deposits made during the year
- ___ Completed business use of auto(s) – complete the section on the Business and Farm organizers
- ___ Purchase invoices on all equipment, vehicles, and livestock purchased, sold, or traded during the year
- ___ Bank issued interest paid statements
- ___ Refund gas tickets if we are filing for the Nebraska Fuel Tax Credit, off road use gas only, do not include vehicle tickets
- ___ Statements from your broker for any hedging or commodity transactions
- ___ All CCC (Commodity Credit Corporation) statements reporting sealed grain