**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 \_\_\_\_ Governmental Program Receipts

 \_\_\_\_ Dividends \_\_\_\_ Co-op or Patronage Dividends

 \_\_\_\_ Social Security Benefits \_\_\_\_ Contract Labor/Rent/Commissions

 \_\_\_\_ State Tax Refunds \_\_\_\_ Annuity or IRA Withdrawals

 \_\_\_\_ Stock or Bond Sales \_\_\_\_ 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