****

**Year End Tax Checklist - Individuals**

**Year End Tax Checklist - Individuals**

Here is a **checklist of what we must receive**from you to complete your personal tax return. We must **receive your information by March 10th** in order to process your return by the April 15th deadline. We will**automatically file a 6 month extension**for you if we have not received your information by March 10th.

* **Statements of Income** -
	+ Form W-2 - Employer Paid Wages
	+ Form 1099 - Interest, Dividends, and Capital Gains from Investments
	+ Form 1099 MISC - Rent, Royalty, Non-employee, and Other Income
	+ Form 1099-R - Distributions from Pensions, Annuities, & Retirement Plans
	+ Schedule K-1 - Partnership or S-Corp Income
	+ Form SSA 1099 - Social Security Benefits
* **Common Deduction Forms** -
	+ Form 1098 - Mortgage Interest Payments / Insurance Premiums
	+ Real Estate Taxes
	+ Sales Tax on any Purchased Motorized Vehicle Purchases
	+ Cash, Non-Cash, Mileage Driven for Charity
	+ Form 1098T - College & Tuition Paid
* **Required Proof of Health Insurance**-
	+ Form 1095A - Health Insurance Coverage
	+ Form 1095B - Individual Health Insurance Coverage
	+ Form 1095C - Employer Provided Health Insurance Coverage
* **Schedule C Businesses / Schedule F Farms**- If you use QuickBooks, please submit an "Accountant's Copy" file to us and DO NOT REMOVE the dividing date 12/31/2016 on your QuickBooks file. If you do not use QuickBooks, please download and complete our Free Small Business Planner under "Accounting Tools" at kfreemanfinancial.com.
* **Retirement Planning -**See us about making Traditional IRA, Roth IRA, SEP IRA, and SIMPLE IRA contributions to get the tax benefit and add to your retirement by the proper filing deadline. Be sure to ask us about the various retirement planning strategies that may benefit your specific tax situation.