

# Andrew J. Mark, CPA PLLC

*While every individual return is different the following are the most common items necessary for your appointment:*

**Employees:**

- All forms W2--should have one from each employer you worked for during 2018

**Homeowners or Itemizers:**

- Medical and dental expenses paid and not reimbursed by insurance or flex plans
- Mortgage statement showing interest and taxes paid (Form 1098)
- Home closing statements if you purchased and/or sold a home during 2018
- Auto registrations paid during the year
- List of cash contributions to charities including religious institutions
- List of non-cash contributions (Goodwill, Salvation Army, etc.)

**Parents:**

- Social security card for any children born in 2018
- Child care expenses
- Name, Address and Tax ID of your child care providers if they are new this year
- College tuition expenses

**Savers and Investors:**

- Interest (1099INT) and Dividend (1099DIV) statements from banks and brokerages
- All K1s for partnerships owned
- List of any sales of bonds or stocks during the year (1099B)
- Amount paid for any stocks or bonds that were sold during the year

**Business Owners**

- Total gross income for 2018 (bring any 1099s received)
- List of business expenses summarized by category

*Please note if your business has numerous transactions please request the separate business spreadsheet if you do not have your own accounting system.*

**New Personal Tax Clients:**

- Previous year tax return
- A voided check if you want your refund directly deposited into your bank account

**Other miscellaneous items:**

- Proof of health insurance, usually on Form 1095, not needed if on Medicare
- All retirement funds taken or distributed usually included on 1099R forms
- Student loan interest paid
- Amount of any contributions to a 529 College Savings Account
- Unemployment compensation received
- Teachers of grades K-12 should have all receipts for classroom supplies.

*Please keep in mind these are just common items. If you have something not covered by this list or have any questions about your specific situation please contact me at (480) 991-2820 or [andrew@ajmarkcpa.com](mailto:andrew@ajmarkcpa.com).*

2018 Tax Questions

|  | (Y/N) | Other Info |
|--|-------|------------|
| Are there any changes to your address, filing status or dependents. If yes please provide details?   |       |            |
| Did you pay childcare expenses?  |       |            |
| Did you and your dependents have healthcare coverage for the full-year? Please attach form 1095 if you have received it.   |       |            |
| Did you receive income from more than one state?<br>States _____   |       |            |
| Did you buy or sell any stocks, bonds or other investment property? If yes please attach statements  |       |            |
| Do you have any foreign bank or brokerage accounts that you own or have signing authority over?  |       |            |
| Did you purchase, sell, or refinance any loans? If yes please attach statements.   |       |            |
| Did you receive any other income such as prizes, awards, gambling winnings, unemployment, combat pay, jury duty or alimony?  |       |            |
| Did you make any changes to retirement accounts other than contributions through work?   |       |            |
| Did you or will you receive a Schedule K-1 from a Partnership, S Corporation or Trust?   |       |            |
| Did anyone listed on this return have any tuition expenses that are required to attend a college, university, or vocational school? If so please attach the schools form 1098-T and a payment listing.   |       |            |
| Did you contribute to a 529 College Savings Account? If yes please enter amount \$_____.   |       |            |
| Did you make gifts to any one person that exceeded \$15,000 during the year?   |       |            |
| If you receive a refund do you want the money direct deposited? If we do not have a voided check on file or if you have changed your account please send or bring a voided check.  |       |            |
| If you owe tax do you want your account debited automatically? If we do not have a voided check on file or if you have changed your account please bring/send a voided check. If you do not have your account debited you will need to mail a check or pay online on your own. |       |            |
| Did you receive any notices from either the Internal Revenue Service or a State taxing agency that we have not previously discussed? If yes, please attach.  |       |            |
| May the IRS discuss your tax return with me for the balance of the year?   |       |            |