



CERTIFIED PUBLIC ACCOUNTANTS



## 2017 Tax Documents Checklist

The 2017 Tax Document checklist will assist you in collecting and reporting information necessary for us to properly prepare your 2017 income tax return.

Please bring with you the following documentation:

- *A copy of your 2016 tax return*
- *Form(s) W-2 (wages, etc.)*
- *Form(s) 1099 (interest, dividends, Social Security, HSA etc.)*
- *Schedule(s) K-1 (income/loss from partnerships, S corporations, etc.)*
- *Brokerage statements from stock, bond, retirement or other investment accounts*
- *Closing statements pertaining to real estate transactions*
- *Form(s) 1099-K (Merchant Card and Third Party Network Payments)*
- *All other supporting documents (schedules, checkbooks, etc.)*
- *Any tax notices received from the IRS or other taxing authorities*
- *Dependent information (including birthdates)*
- *Education Expense*
- *Medical & Dental Expenses*
- *Form(s) 1098 (mortgage interest) and property tax statements*
- *Charitable Donations*

We look forward to meeting with you and assisting in the preparation of your tax return at the Hercules Credit Union Branch. Please feel free to contact our office in advance if you have any questions or concerns.

Sincerely,

**Anderson Bradshaw PLLC**

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