CHECKLIST

General Information:

____Dependent Addition or Change in current dependents – Required on each change: Social security card and dates of birth.

____Address, e-mail or phone change – List changes.

_____

_____

_____ If you were married or divorced during the tax year, please check here and list date of change. If you have dependents to claim, please provide which dependents you will claim on the tax return

_____

_____

Income

_____W-2s from Employers
_____Retirement Income-1099 R
_____Social Security Income 1099 SSA
_____Interest Income – 1099 INT
_____Dividend Income – 1099 DIV
_____Unemployment – 1099 G
_____Tax Refunds – 1099 G
_____Stock Sales-1099 S
_____Sale of Assets sale (sale & purchase info required)
_____Miscellaneous Income
_____Health Savings Account Disbursements
_____ 1099-K

Itemized Deductions

_____Medical Insurance
_____ 1095A (must have a copy)
_____Pharmacy Costs
_____Doctors, Dental, Clinics, Hospitals
_____Medical Equipment/Supplies
_____Medical Miles
_____Auto Licenses: Copy of Registrations
_____Real Estate Taxes
_____Home Mortgage Interest 1098
_____Contributions – Receipts Required: Certain contributions can be taken without itemizing (please contact Our office if you have any questions)

Information for Credits

_____Child Care Expenses
_____Education Costs for College Students-1098T
_____Health Savings Account Information

General Deductions

_____ IRA Contributions
_____ Student Loan Interest
_____ Teacher Expenses

Please feel free to upload your documents to our secure portal at www.itabk.com.
If you do not have your own personal portal, call the office and we will assist you in setting one up.
To securely upload your documents without a portal, go to our website www.itabk.com clicking "login" and "continue as guest" to upload your documents to our secure portal.

Call for your appointment, if one is needed. - (406)821-3362

Appointment Date_____ Time_____