



TAX TIME CHECKLIST

Love it or hate it... it's almost tax time! Although some individuals may prefer to wait until the last minute to file their tax returns, others may be eagerly anticipating a refund and wish to file their returns as soon as possible. In either case, some information needed to file your tax return may not be as obvious as your name or social security number. To ensure you're not missing any pertinent information, we've compiled a checklist of the not-so-obvious items that you may need to provide your tax-preparer.

If you have questions about the items listed below or need help filing your return, HORNE can help. Contact Tracie Dupuy at tracie.dupuy@hornellp.com

Business Checklist

Deadline for C-Corps: April 17, 2018
Deadline for S-Corps and Partnerships: March 15, 2018

	Number of W-2s filed for tax year
	Amount paid for shareholder health insurance
	Amount paid for shareholder life insurance
	Income Statement, Balance Sheet & General Ledger
	Estimated Tax Payments made for the tax year (Extension payments if applicable)
	Officer Compensation
	Any new states of operation during the year



Individual Checklist

Deadline: April 17, 2018

	Taxpayer & Spouse Driver's License (DL Number, Issuing State , Expiration Date and Issue Date)
	Form W-2 (Salary & Wages)
	Form 1099-INT (Interest Income)
	Form 1099-DIV (Dividend Income)
	Form 1099-MISC (Other Income & Non-employee Compensation)
	Form 1099-R (IRA, Pensions & Annuities)
	Form SSA-1099 (Social Security Statement)
	Form 1099 Consolidated (Brokerage Statement)
	Form K-1 (Pass-through Entity Income)
	Income & Expenses for Rental Properties
	Income Statement, Balance Sheet & General Ledger for businesses reported on Schedule C
	Income Statement, Balance Sheet & General Ledger for farming income
	Form 8889 (Health Savings Account Contributions)
	Medical Expenses (Doctors, Dentist, Hospitals, Prescriptions & Premiums Paid)
	Taxes Paid (Real Estate Taxes & Car Tags)
	Form 1098-MIS (Mortgage Interest Statement)
	Form 1098-E (Student Loan Interest Statement)
	Charitable Contributions
	Form 1098-T (Tuition Statement)
	Child and Dependent Care Expenses
	Form 1095-A, 1095-B and/or 1095-C (Health Insurance Coverage)
	Estimated Tax Payments made for tax year