

Items Needed to Complete Your 2017 Tax Return

Name _____

Address _____

Email: _____

Phone: _____

_____ W-2's.

_____ 1099's for Dividend.

_____ 1099's for Interest.

_____ 1099's for Retirement Account.

_____ Student loan interest paid for the year .

_____ Medical expenses for the year.

_____ Stock & investment yearly information/1099 statement.

_____ Stock & investment basis information.

_____ Closing Statements for purchase & sale of residence.

_____ Mortgage interest statement /Form 1098.

_____ Property taxes on residence.

_____ Form 1098-T for education credit for higher education.

_____ Income Property - Income & Expenses (see checklist).

_____ Self Employed - Income & Expenses (see checklist).

_____ Job related expenses - Dues, Uniforms, etc.

_____ Home office expenses.

_____ Changes in Dependents.

_____ Last Paystub of the year.

_____ Form 1095 A, if you have received a tax credit from the insurance market place.

_____ Form 1095 B or Form 1095 C (Proof of Health Coverage if applicable).



712 Kahkwa Blvd. Erie, PA 16505
Phone 814-456-1040, 814-454-7559
jtushak@tushakaccounting.com

**Rental
Income & Expenses Checklist**

PROPERTY	KIND AND LOCATION	Acquired Mo - Yr	COST
INCOME		PROPERTY	
RENTS RECEIVED			
OTHER INCOME			
EXPENSES			
ADVERTISING			
AUTO AND TRAVEL - MILES			
CLEANING AND MAINTENANCE			
COMMISSIONS			
INSURANCE			
LEGAL & PROFESSIONAL			
MORTGAGE INTEREST PAID TO BANKS ETC			
OTHER INTEREST			
	CARPENTRY		
	FURNACE		
	PAINTING		
	PLUMBING		
REPAIRS	OTHER		
LIST IMPROVEMENTS SUCH AS NEW ROOF		<i>add'l comments</i>	
SUPPLIES			
TAXES			
	ELECTRICITY		
	FUEL		
UTILITIES	WATER/SEWER		
YARD/SNOW REMOVAL			
OTHER			
WHAT % OF PROPERTY WAS RENTAL			%

additional comments

**Self Employed
Income & Expenses Checklist**

Total Sales
Inventory / Materials
Purchased
Inventory at 12/31/2017
Shipping Fees
Postage
Education
Business Mileage
Total Mileage
Entertainment
Telephone
Utilities
Internet Expense
Clients Gifts
Dues & Subscriptions
Tools
Equipment
Rent
Insurance
Legal & Professional Fees
Office Expense
Repairs
Supplies
License
Bank Fees
Subcontractors
Credit Card Fees
Intrest