



# TAX PREPARATION CHECKLIST

Tax Year 2016

## Paperwork to organize for your in-person or virtual tax appointment

- Completed & Signed Choice Tax Solutions 2016 Tax Organizer
- Copy of 2015 Tax Return (new clients only)
- Copies of Social Security cards for you and all dependents
- Identification (Driver's License, Passport) - if you are a new client with us
- W-2 forms, corrected forms W-2(c)
- Forms 1099-Misc
- Forms 1099-R - IRA, 401(K), pension distributions
- Form K-1 (Partnerships & S Corporations)
- Interest, Dividend & Brokerage forms
- Mortgage interest, real estate taxes
- Form 1095-A (if you purchased insurance on the Exchange)
- Form 1095-B, 1095-C (health insurance coverage)
- Worksheets from our website: Self-employment, Dependent Care, Rental Real Estate, etc.
- If you have any overseas financial accounts (bank, brokerage, mutual funds, annuities, life insurance, etc.) and/or rental property outside of the U.S., please contact us for additional paperwork.