Zulch
Tax Consultants & Accountants

Zulch, Inc.
8 Prince Street
Red Hook, NY 12571

T: 845.758.0096 • F: 845.758.1297
kzulch@zulchtax.com
www.zulchtax.com

Tax Year 2016 Checklist:

- Please provide a copy of the front and back of the driver's licenses for yourself and spouse if applicable and social security cards for yourself and all dependents.
- Did you and all dependents claimed on your tax return have health insurance for the entire year?
- If so, you should receive Form 1095-A, 1095-B, or 1095-C. We will need those to complete your tax returns.
- Any changes in contact information: last name, marital status, address, phone, e-mail?
- Any changes in dependents: birth, death, adoption, split custody of children?
- Confirm social security numbers and birthdates for everyone on your tax return.
- Be sure to tell us if your bank information has changed for direct deposit or direct debit purposes.
- Income sources: W-2 for wages, 1099-MISC for Other Miscellaneous income; 1099-INT or DIV for interest and dividends; 1099-R for retirement distributions, Social Security income, unemployment or disability income.
- Gains or losses from sale of stock Form 1099-B. We will also need the date of purchase and the purchase price (cost basis). If you do not know your cost basis, your investment advisor should be able to provide this to you.
- Other income: Schedule K-1, Rental, Jury Duty, Gambling, Alimony, etc.
- Are you self-employed? If so, please provide a summary of your business income and expenses.
- College tuition and fees paid. We will need Form 1098-T. This can be printed from student's online college account.
- Student loan interest paid.
- Mortgage interest paid (Form 1098) and real estate taxes (town and/or village and school) paid.
- Medical and dental expenses (need to exceed 10% of AGI, 7.5% if age 65 or over).
- Long term health care premiums paid.
- Charitable donations – cash and non-cash. Miles driven for charitable purposes?
- Fees paid for preparation of last year's taxes (new clients only).
- Unreimbursed employment expenses (need to exceed 2% of AGI)– union dues, travel, job education, uniforms, etc.
- Childcare expenses – will need complete name, address, phone number and tax ID number of the provider.
- Any contributions or distributions to/from a HSA account? Provide the Form 8889 and/or Form 1099-SA as applicable.
- Contributions to IRA, SEP, or other retirement plan.
- Did you make any contributions to a 529 plan? If so, please provide the amount contributed.
- Did you purchase a solar panel energy system for your home or make other energy efficient improvements?
- Alimony paid or received? Provide the amount and social security number of payee/payer.
- Do you have a foreign bank account? If yes, please provide bank name and dollar amount.
- Did you have any debt forgiven? Provide the 1099A or 1099C.
- Any other relevant information: job search expenses, moving expenses, educator expenses (max $250), miles driven for medical purposes, any expenses related to your investments.

NYS Residents:

- Did you receive the NYS Property Tax Freeze Credit in 2016? If so, we need the amount of the check received.