Gathering Your Tax Documents

The quality of your tax return and the timeliness of its preparation depend strongly on obtaining all your tax documents and information. Therefore, we have created the following checklist for our online submit forms and tax related documents. As more companies move to electronic delivery of their tax documents and statements, this checklist will help ensure you are not missing important tax documentation.

Submit Forms

You can find these easy and helpful documents on our website here:

www.blueskiestaxservice.com/tax-center

- Contact Information
- Dependents
- Child, Dependent Care
- Education, Tuition, Student Loans
- Medical Expenses, HAS Contributions
- Mortgage, Property / Real Estate Taxes
- Charitable Contributions
- Partner Expenses
- Retirement and 529 Accounts
- Personal Property / Sales Tax
- ACA and 2018 Tax Questionnaires

Income

- W-2s from Employers
- K-1s from Partnerships, S-Corps, Trusts, Estates
- 1099s from Banks, Investment Brokers, Government Agencies, Contract Employers, etc.
- Cost Basis, Purchase History for Stock Sales (if you received a 1099-B)

Home Deductions

- 1098s from Mortgage Lenders (the form is now required, not just the figures)
- Home Purchase / Refinance Documents, Closing Disclosure / HUD Statements
- Private Mortgage Insurance (PMI) Premiums, Year-End Loan Statements
- Property / Real Estate Taxes Paid

Small Business

- Small Business Online Submit Form
- Vehicle and Mileage Online Submit Form
- Home Office Deduction Online Submit Form
- List of equipment, service dates, values, if depreciated in earlier years

Rental Properties

- Rental Property Online Submit Form
- Vehicle Mileage Online Submit Form
- HUDs or Closing Statements for purchases, refinances and/or sales
- Prior year depreciation schedules showing cost basis and service dates
- List of improvements, completion dates, values if depreciated in earlier years
- Form 8542 or similar detailing any disallowed passive losses on your rental properties

Tax Questionnaire, Miscellaneous Questionnaire

If you are a previous BSTS client, please complete the tax questionnaire included in your tax organizer. Please also visit the Tax Center page of our website and complete the Miscellaneous Questionnaire submit form. These will ensure a comprehensive tax return.

Additional Checklist for New Tax Clients

- Last Year's Federal **and** State Tax Returns

  At the very minimum we need your Form 1040 (pages 1 and 2) and all lettered schedules (A, B, C, D, and E). Information such as last year's itemized deductions, carry-forward losses from investment sales, accumulated depreciation, disallowed passive losses, etc. Some of these things might not pertain to you, but providing this information is important.

  If you were subjected to AMT in the past, we will need the past four years (sorry).

  A soft copy such as a PDF of your entire tax return is helpful (and actually preferred).

- Last Year's Tax Prep Fees (they might be deductible)
- Dates of Birth and Social Security Numbers (you, spouse, children, etc.)
- Routing and Account Numbers for Direct Deposit

The above items are bare bones. We strongly encourage all new tax clients to go through each online submit form to ensure all information is being gathered. Our secure online submit forms are available at:

www.blueskiestaxservice.com/tax-center