

PRONTO

I N C O M E T A X

2018 Client Tax Organizer

It's that time of year, time to Get Organized!

- New forms, such as 1095-C from employer
- When in doubt, bring it or send it

I - Income & Interest

This section is basically for who paid you and how much. Make sure to get all of their documents either online or by requesting they be sent via mail.

- W2, 1099 Forms from all employers
- Social Security Income
- Sole Proprietor, Business Income
- Rental Income
- Partnership, LLC and pass through Income
- Dividends and Interest

II - Personal Deductible Expenses

Bear in mind that most will receive at least \$12,000 for Single and \$24,000 for Married filers in Standard deductions, excluding Retirement (IRA) contributions and Casualty & Loss.

- Retirement (IRA) Contribution
- Mortgage Interest - 1098
- Real Estate Taxes
- Tuition & Student Loans - 1098-T
- Health Care and Insurance
- Sales Tax for Large Purchases (i.e. Car, Boat, RV, etc.)
- Donations - Cash and Goods
- Casualty & Loss - Theft, Extenuating Losses

III - Business Deductible Expenses

- Cost of Goods Sold
- Communications: Phone, Internet
- Advertising/Marketing
- Travel, Meals & Entertainment
- Mileage Travel Log for Vehicle Business Use
- Other expenses directly related to the production of goods and services in the business

IV - Bought & Sold

More details

- Real Estate: Primary Residence, Vacation Home, Investment
- Business
- Stocks, Mutual Funds, ETFs, Bonds

V - It's Complicated

Any other document, information you deem pertinent. When in doubt, bring it! Some other items to bring up with your Accountant include

- **Life Events:** Marriage, Divorce, Birth, Adoption and Death
- **Major Purchases/Sales:** Business, Home, Assets
- **Lifestyle Changes:** Changes in income, expenses
- **Future:** Planning a major move this year, let us know so we can help you plan!

Call us today to schedule your appointment 305.267.1092

Or visit our website: www.prontotax.com