Year End Review Appointment Checklist

What information do I need to provide for my Year End Review Appointment?

Personal Tax Planning

Here is the information we will need from you personally. If you do not have exact figures, estimates are fine.

- Year-to-date paystub for any wages earned.
- Personal mortgage interest estimate. (if much different from prior year)
- Personal real estate tax estimate. (if much different from prior year)
- Charitable contributions estimate.
- Stock Sales (Gains or Losses)
- Interest and Dividend income estimate.
- Any personal estimated tax payments for Federal or State.
- Any other items of income to note for 2018.

S-Corporations

If you have an S-Corporation, this is the information we will need from you to complete your review.

- Year-to-date income/expense for your corporation.
- Projected income/expenses from your appointment date to 12/31/18.
- If you have taken payroll or wages from your corporation - please provide us with you last paystub or withholding information.
- Please provide us with the total of money you have taken from the corporation via - Distributions, Rents, and Wages.
- If you were incorporated in 2018 - we will need your income and expenses split between the "Pre-Incorporation" period, and the "Post-Incorporation" period. If you have questions on this, please let us know.

Rental Properties

Here is the information we will need if you have Rental Properties in 2018:

- Estimate of Rents/Expenses for each property in 2018.
- If you BOUGHT any rental properties in 2018, we will need to get your purchase information. (typically the settlement statement)
- If you SOLD any rental properties in 2018 we will need the sale information (typically the settlement statement)