

2017 TAX DATA SHEET

	TAXPAYER (HUSBAND)	TAXPAYER (WIFE)
NAME		
SOC. SEC. #		
DRIVERS LIC. #		
LIC ISSUE DATE		
LIC. EXP. DATE		
OCCUPATION		
DATE OF BIRTH		
HOME ADDRESS		CITY, ST, ZIP
TELEPHONE #	HOME () -	BUSINESS () -
	CELL () -	SCHOOL DISTRICT
EMAIL ADDRESS		

CHILDREN AND / OR DEPENDENTS

NAME (FULL)	SOC. SEC. #	RELATIONSHIP	BIRTH DATE	MONTHS AT HOME	CHILD CARE EXPENSES

BANK ACCOUNT INFORMATION FOR DIRECT DEPOSIT OF REFUND

Providing this information will significantly decrease the time required to receive your refund!

Bank Name _____ Account Type Checking Savings
 Routing Number _____ Account Number _____

BRING THIS TAX INFORMATION WITH YOU

- Form W-2 statement from your employer and/or W-2p for pensions (last check stub if no taxes are withheld on pension).
- Bank or Savings & Loan interest income statements (1099 INT) (including checking & tax exempts, U.S. Bond and Treasury Bill interest).
- Dividend statements (1099 DIV) and brokerage year-end statements.
- All home real estate tax bills for 2017 – paid or not (we will need the 2017 assessed taxes and taxable value). We must have tax bills to prepare the Michigan Property Tax Credit.
- Social Security received for 2017 (bring SSA-1099 Form)
 Husband \$ _____ Wife \$ _____ Children \$ _____
- Tax-exempt interest income (bring statements or 1099).
- Furnish detail (Forms 1098 & 1099) for miscellaneous income such as director fees, commissions, alimony, prizes, state & local tax refunds, etc. as well as any broker statements.
- Do you plan to make a Regular or Roth IRA contribution prior to April 15, 2018?
- Tuition information from your school for educational credit(s). Please include 1099T if applicable.
- E-commerce income reported on a 1099-K for schedule C filers.
- If this is your first year with us, bring a copy of your tax returns for 2015 & 2016.***



2017 ESTIMATED TAX PAYMENTS PAID (TAXPAYER MUST COMPLETE, IF APPLICABLE)

	FEDERAL ESTIMATES		STATE ESTIMATES		CITY ESTIMATES	
	AMOUNT	CHECK # & DATE	AMOUNT	CHECK # & DATE	AMOUNT	CHECK # & DATE
4/18/17						
6/15/17						
9/15/17						
1/16/18						

2017 Tax Changes:

- Please see our web-site www.hkgclcpa.com for the latest tax updates and information.
- Note: You/Spouse and dependents must either have health insurance coverage or qualify for an exemption. (See our website Usefull Links tab – <http://www.hkgclcpa.com/UsefullLinks.aspx>). Penalties have increased for 2017 to 2.5% of household adjusted gross income or \$695 per adult and \$347.50 per child to a max of \$2,085.
- Major tax legislation was passed in December 2017 (See our website – News tab and Tax Tips for details). Many provisions will apply for 5-10 years and some are permanent.
- If you do not file your return by the due date (including extension) you may have to pay a failure-to-file penalty.

Schedule A Itemized Deduction Worksheet:

~The following information will be required if you plan on itemizing your deductions. The standard deductions are as follows: married filing jointly (\$12,700), married filing separately and single filers (\$6,350), Qualifying Widow(er) (\$12,700) and head of household (\$9,350).

~Please be advised that paid bills and cancelled checks claimed as deductions must be kept for a period of at least three years to comply with tax regulations and audit procedures. DO NOT CLAIM as deductions any bills that have not actually been paid within the calendar year of 2017.

MEDICAL	AMOUNT	CONTRIBUTIONS	AMOUNT	MISCELLANEOUS	AMOUNT
Dentist		CASH OR CHECKS *		Alimony	
Doctors		Church		Paid to	
		**College / University		Soc. Sec. #	
Hospital		Public Radio /TV		Amount	
Ins. Reimbursement		Other		Child Care Expenses (12yrs/under)	
Lodging Expenses				Paid to	
Long Term Care Prem.		PROPERTY (NON CASH) *		Soc. Sec. #	
Medicare Prem.		Charitable Mileage		Amount	
Med. Ins. Prem.		Goodwill Industries		Education Expenses	
Miles Driven		Salvation Army		Gambling Losses	
Prescription Drugs		Other		Investment Expenses	
Other		*Special form required for non-cash contributions that exceed \$500. All Contributions must have both statements and canceled checks to qualify		License Fee (Auto tabs)	
INTEREST EXPENSE	AMOUNT			Professional Subscriptions	
Home Equity Loan		**MI no longer gives an additional credit for these donations		Safe Deposit Box	
Home Mortgage		TAXES	AMOUNT	Safety Equip., small tools	
Investment Interest		WE MUST HAVE COPIES OF ALL BILLS.		Tax Preparation Fee	
Land Contracts		Cottage		Teacher/Educator exp.	
Mortgage Int. Rate		Home		Telephone (business use)	
Mortgage Debt at 12/31		Land		Uniforms/Maintenance	
Refinance/Points Pd.		License Plates		Union/Professional Fees	
		Major Purchases, Sales Tax		Other	

ADDITIONAL INFORMATION WE MAY NEED

- 2017 Energy Credit Information www.hkgclcpa.com --- Useful Links / Federal Energy Tax Credits
- Business use of automobile / Business Mileage Expense – we will need mileage breakdown per vehicle
- Furnish detail of income and expenses for**
 - Self employed person, bills for equipment, vehicles,
 - farm operations, or rental & property purchased in 2017
- Sale of Property
 - Form 1099-B
 - For stock sale, brokers buy and sell slips
 - For home sale or land sale, closing statements for home sold and for new home purchased and/or refinancing of current mortgage loan
- For Michigan Home Heating Credit, (for persons with limited income), total heating cost for 2017 \$ _____ (from November 2016 through October 2017).
- IRA Year End statements (for review of Roth IRA Option).
- Michigan Use Tax Purchases . . . \$ _____

