Warren Office
(586) 751-6060
Fax (586) 751-1533
www.hkglcpa.com

Heemer Klein & Company

Certified Public Accountants

2018 TAX DATA SHEET

Richmond Office
(586) 727-5145
Fax (586) 727-5062
www.hkglcpa.com

	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 – USE BACK IF NEEDED

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 Chking_____Savings_____Joint? _____

Routing Number ______________________ Account Number ______________________________

BRING THIS TAX INFORMATION WITH YOU

- All W2's from your employer
- All Interest and Dividend Income Statements (1099 INT, 1099 DIV) from banks, credit unions, and brokerage firms
- Social Security statements (SSA-1099)
- Real Estate tax bills for 2018 (paid or not) and for previous years paid in 2018.
- Any other income statements for miscellaneous income, alimony, prizes, state & local tax refunds, lottery winnings (W2G), etc.
- Tuition information for each college student (1099T) and a list of all related college expenses
- Health Insurance coverage statement 1095A (if in marketplace), 1095B or 1095C from your employer sponsored health coverage.
- If this is your first year with Heemer Klein, we need a copy of your 2016 and 2017 tax returns to best prepare your 2018 return.

Small and New Business Start-up Specialists!

2018 Estimated Tax Payments Paid (Taxpayer must complete, if applicable)

	Federal	Estimates	State	Estimates	City	Estimates
	Amount	Check# & Date	Amount	Check # & Date	Amount	Check # & Date
4/18/18						
6/15/18						
9/15/18						
1/15/19						

2018 Tax Changes:

- Please see our web-site www.hkglcpa.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 Useful Links tab – http://www.hkglcpa.com/UsefulLinks.aspx). The individual-mandate penalty will end **AFTER** the 2018 tax-filing year.
- 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.

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 ($24,000)**, married filing separately and **single filers ($12,000)**, and head of household ($18,000).

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 2018.

Medical	Contributions	Taxes
Dentist -	**Cash or Checks - All Contributions must have both statements and canceled checks to qualify**	***This category is limited to $10,000 WITH all State and Local Income Taxes.***
Doctors -	Church -	Home Property Taxes -
	College / University -	Cottage –
Hospital -	Public Radio /TV -	Land -
Ins. Reimbursement -	Other -	License Tabs -
Lodging Expenses -		
Long Term Care Premiums -	**Non Cash - If over $500 must have detailed list and value of donation with names and addresses**	**Interest Expenses**
Medial Insurance – other than Medicare -	Salvation Army/Goodwill -	Home Mortgage –
Miles Driven	Other -	*Home Equity -
Prescription Drugs	Other -	**Land Contracts -
Other (glasses etc) -	Charitable Mileage -	

*For Home Equity Loan – deductible only if used to purchase or improve home

**For Land Contracts - We need the name and address of the owner

Additional Information We May Need	
*Alimony – paid (or received) -	
**Child Care expenses (12yrs/under)-	
Gambling losses -	
IRA Contributions made before April 15, 2019 -	
Did you contribute to a Health Savings Acct (HSA)? **(Do NOT include emplyer's contributions.)**	

*Must have name and SS# of recipient **Must have name/address/ID# of caregiver