

# Berardi

## Accounting Group

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Dear Valued Client:

January 14, 2018

Greetings! It is time to gather your tax information for your **2017 Income Tax Return** preparation. We are pleased to send this helpful list to assist you but also suggest you use your copy of last year's return as a guide.

- Changes of marital status, name, address, phone numbers, email address and identity protection pin #.
- Your account number and bank's routing number if you prefer direct deposit of refund.
- New dependent information; include social security number and date of birth.
- All income, including Forms W-2 for wages, 1099M, tips, 1099Q, alimony and unemployment benefits.
- Forms 1099R regarding pensions, IRA distributions and/or social security benefits.
- Forms 1099 for interest, dividends, capital gains. Include investment account statements dated 12/31/17.
- Details regarding the sale of any investments; include original purchase date and price.
- Proof of Health Insurance Coverage, Forms 1095A/1095B and/or 1095C, to show coverage dates and if premiums were paid on your behalf by the government. Also any proof of exemption, if not covered.
- Hurricane Irma proof of repair costs not covered by insurance.
- Statements of payment of mortgage interest, property taxes, medical expenses, health insurance, charitable contributions and any traditional and/or Roth IRA deposits.
- Settlement Statement(s) from home purchase and/or sale, refinance or equity line of credit.
- Daycare / Aftercare / Summer Camp /Dependent Care details; amount paid, address & Tax ID# of provider.
- Receipts from major home improvement and/or vehicle purchase that generated Florida sales tax.
- Forms 1098T tuition payments, books, supplies, equipment and / or student loan interest paid.
- Non-reimbursed employee expenses and / or business expenses related to self-employment.
- Purchase of Plug-In Electric Vehicle.
- Income and expenses from rental property.
- Estimated tax payments (if paid).

We are grateful for the opportunity to serve you would appreciate your recommendation to family, friends, and colleagues. Be assured that they will receive our best service and that all meetings are confidential. Also, my wife Cheri will be assisting again this year and is available to discuss your investment needs.

Contact us when you are ready for an appointment. We can meet in person or you may simply drop-off, mail, fax or email your information. We would like to make filing an accurate tax return as convenient as possible. Our office hours are *Monday-Friday, 9am to 6pm and Saturday, 12 noon to 5pm.*

We look forward to hearing from you. Thank you.

Sincerely,

Richard Berardi, E.A.  
Accountant

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