

# Tax Information Checklist 2019

(For Returning Clients)

Your Name:	Phone:	Email:
Spouse Name:	Phone:	Email:
Mailing Address:		

## Dependents

Full Name	Social Security #	Date of Birth	Months Lived in Home in 2019	Relationship to taxpayer(s)

## Don't forget to Include ...

### Income

Wages (Forms W-2)
Interest/Dividend Income (Forms 1099-INT & 1099-DIV)
Unemployment Income (Forms 1099-G)
Social Security Income (Forms SSA-1099)
Pension/IRA Income (Forms 1099-R)
Cancellation of Debt Income (Forms 1099-C)
Other Income (Provide Forms 1099, etc)

### Self-Employment Income

Forms 1099-MISC
<b>Summary</b> of Income & Expenses
Business Auto Information (See Back of this Form)
Home Office Expenses (Utilities, Heat, Repairs, Insurance, Etc)
List of assets purchased (Include Date Acquired and Cost)

### Did you sell any assets?

Forms 1099-B, 1099-S
Sell Real Estate? We need <b>CLOSING DISCLOSURE (HUD)</b>
We <b>need</b> the asset's <b>Cost</b> Basis, Date Acquired, and
How you acquired it? (i.e. purchase, gift, inheritance)

### Rental Income

We need a <b>SUMMARY</b> of Rental Income & Expenses
Did you Refinance? We need <b>CLOSING DISCLOSURE (HUD)</b>
Please Separate Repairs from Improvements?
List Improvements by project (i.e. New Kitchen, New Bathroom, etc)

### Itemized Deductions

<b>MEDICAL EXPENSES</b>
Doctor, Dentist, Optometrist, Prescriptions YOU paid
Health & Long Term Care Insurance YOU paid
Mileage Traveled to doctor, pharmacy, labs, etc
You can only deduct the portion of medical over 10% of your AGI. We will calculate this for you
<b>STATE AND LOCAL TAXES</b>
Real Estate Taxes Paid during the year
Personal Property Tax (Auto, Boat, etc)
Sales Tax on NEW vehicle?
Fire Tax
<b>INTEREST EXPENSE</b>
Mortgage Interest (Forms 1098) If you <b>refinanced</b> you should have 2 forms 1098! We need <b>Closing Disclosure (HUD)</b>
Student Loan Interest
<b>CHARITABLE CONTRIBUTIONS</b>
Total Donations in Cash and Check
Property Contributions (ie Salvation Army, Big Sisters) Be sure to <b>bring in your signed forms!</b>
Remember <b>YOU</b> must assign the value to the goods you donated
<b>MISCELLANEOUS ITEMIZED DEDUCTIONS</b>
Gambling Losses (To Extent of Winnings)

### Health Insurance – IMPORTANT IF YOU RECEIVE CREDITS

Form 1095-A (for health insurance purchased through a public exchange) or Form 1095-B or C (for health insurance purchased outside of a public exchange).

**COLLEGE EDUCATION CREDITS** – We need the form 1098-T from the educational institution **AND** an account transcript showing what was billed, paid and how paid. IRS is getting tough with these credits!

**We need a copy of your license or state ID card!!**

# 2019 ESTIMATED TAXES PAID

**Please provide a COPY of these cancelled checks!**

Quarter	Date DUE	Date Paid <i>Federal</i>	<i>Federal</i> Amount	Federal Check #	Date Paid State	State Amount	State Check #
1st Quarter	Apr 15, 2019						
2nd Quarter	Jun 15, 2019						
3rd Quarter	Sep 15, 2019						
4th Quarter	Jan 15, 2020						

## BUSINESS VEHICLE INFORMATION

	<b><u>AUTOMOBILE</u></b>	<b><u>#1</u></b>	<b><u>#2</u></b>
1)	Total Miles Driven this year =		
2)	<u>Mileage Breakdown</u> : Business Miles driven this year:		
	Commuting Miles =		
	Personal Miles =		
3)	Description of Vehicle		
4)	Date vehicle first used for business		
5)	Interest paid on vehicle		
6)	Parking and Tolls		
7)	Base Price =		
	Less Trade-In =		
	Net Price =		
	Plus Sales Tax =		
	Total Cost =		
	<b><u>or</u></b> Lease Payments =		
8)	Gasoline, Oil, Lubrication, Repairs, Maintenance, Washes		
9)	Tires, Supplies		
10)	Insurance		
11)	Registration Fees and Taxes		
12)	Garage Rent		
13)	Other		