

# Income Tax Checklist

Taxpayer's name	SSN	
Spouse's name	SSN	
Taxpayer's occupation	Birthdate	Blind?
Spouse's occupation	Birthdate	Blind?
Address		
Phone		
Did you receive, sell, send, exchange or acquire any financial interest in virtual currency? Y or N		

## DEPENDENTS

Name	SSN*	Birthdate	Relationship
1)			
2)			
3)			
4)			

  

Income	Support by you	Support by others	Months in your home
1) \$	\$	\$	
2) \$	\$	\$	
3) \$	\$	\$	
4) \$	\$	\$	

\* You must provide a Social Security number for all dependents.

## PAPERWORK TO BRING

<input type="checkbox"/> W-2s	<input type="checkbox"/> 1099-INTs	<input type="checkbox"/> 1099-DIVs	<input type="checkbox"/> Other 1099s
<input type="checkbox"/> K-1s	<input type="checkbox"/> Property tax bill	<input type="checkbox"/> Last year's tax return	<input type="checkbox"/> Health insurance coverage information

## ECONOMIC IMPACT PAYMENTS

	Taxpayer & Spouse	Dependents
Amount received for first payment	\$ _____	\$ _____
Amount received for second payment	\$ _____	\$ _____

## OTHER INCOME

SALE OF STOCK OR OTHER PROPERTY	Cost	Sales price

If you have other income, please bring all figures and supporting data. Examples:

- Tips \_\_\_\_\_
- Pensions/annuities \_\_\_\_\_
- Jury duty \_\_\_\_\_
- Unemployment (1099-G) \_\_\_\_\_
- Alimony received\* \_\_\_\_\_
- Prizes (1099-MISC) \_\_\_\_\_
- Self-employment \_\_\_\_\_
- Partnerships and S corporations \_\_\_\_\_
- Estates & trusts \_\_\_\_\_
- Social Security benefits \_\_\_\_\_
- Scholarships & fellowships \_\_\_\_\_
- Tax refunds \_\_\_\_\_
- Royalties \_\_\_\_\_
- Nontaxable income \_\_\_\_\_
- Gambling \_\_\_\_\_
- Hobby income \_\_\_\_\_
- Other \_\_\_\_\_

Please bring supporting documents (Form 1099-Bs and statements)

- If you have a business or rental property, please attach an income/loss statement and supporting documents.
- If you borrow money and the debt is canceled or forgiven, please include Form 1099-A and/or 1099-C.

\* Not taxable for divorces commencing after Dec. 31, 2018

# Deductions and Credit Items

## RETIREMENT

Contributions to a traditional IRA  
 Taxpayer Date \_\_\_\_\_  
 Spouse Date \_\_\_\_\_

Contributions to a Roth IRA  
 Taxpayer Date \_\_\_\_\_  
 Spouse Date \_\_\_\_\_

Penalty for early withdrawal \_\_\_\_\_

Alimony pd. (can't deduct for divorces commencing after 12/31/18) \_\_\_\_\_

Self-employed health insurance \_\_\_\_\_

Keogh, SEP & SIMPLE contributions \_\_\_\_\_

## MEDICAL EXPENSES

Medical savings account (MSA) contributions \_\_\_\_\_

Health savings account (HSA) contributions \_\_\_\_\_

Insurance & Medicare premiums \_\_\_\_\_

Prescriptions \_\_\_\_\_

Eyeglasses \_\_\_\_\_

Doctors \_\_\_\_\_

Dentists \_\_\_\_\_

Hospital \_\_\_\_\_

Ambulance \_\_\_\_\_

Medical auto mileage \_\_\_\_\_

Other medical travel expenses \_\_\_\_\_

Hearing aids & batteries \_\_\_\_\_

Other medical expenses \_\_\_\_\_

Reimbursements \_\_\_\_\_

## TAXES

Real estate tax \_\_\_\_\_

Personal property tax\* \_\_\_\_\_

City/county tax\* \_\_\_\_\_

Sales tax \_\_\_\_\_

Other\* \_\_\_\_\_

Estimated Taxes	State	Federal
Date pd.		
Date pd.		
Date pd.		
Date pd.		

## INTEREST EXPENSE

Home mortgage (1098) \_\_\_\_\_

Home mortgage – pd. to individuals \_\_\_\_\_  
 (Include name and SSN of individuals)

Investment interest\*\* \_\_\_\_\_

Interest pd. on student loans (1098-E) \_\_\_\_\_

## CONTRIBUTIONS

Church \_\_\_\_\_

Other cash contributions \_\_\_\_\_

Charitable auto mileage \_\_\_\_\_

Property donated for which you have receipts (fair market value) \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

For 2020, taxpayers using the standard deduction are allowed an above-the-line charitable contribution of up to \$300.

## CASUALTY & THEFT LOSSES

The following expenses may only be claimed in a presidentially declared disaster area.

Cost of property lost \_\_\_\_\_

Fair market value of property \_\_\_\_\_

Insurance reimbursement received \_\_\_\_\_

## JOB-RELATED MOVING EXPENSES

Only active military personnel may claim the following deductions.

Travel & lodging \_\_\_\_\_

Moving household goods \_\_\_\_\_

Total moving miles \_\_\_\_\_

## CHILD CARE EXPENSES – Bring list of monthly totals

Provider's name	Address	ID# of provider(s)	Amount pd.

## EDUCATION CREDITS (1098-T)

Name of institution	Tuition pd.	Who attended	When classes began

LOANS: If you borrowed money during the year, bring a list showing the amounts, dates and use of proceeds.

\* Taxpayers who itemize can deduct their state individual income, sales and property taxes up to a limit of \$10,000 in total.

\*\* For taxpayers who itemize, your investment interest expense deduction is limited to your net investment income.