

GENERAL INFORMATION CHECKLIST

Personal Information

- Name(s), social security number(s), and date(s) of birth for yourself, spouse (if married), and any dependents (if applicable)
- Social Security cards and proof of residency for children or other dependents
- School , doctor records or similar documents when claiming any of the following credits and/or filing status:
Earned Income Credit, Child Tax Credit, American Opportunity Credit, Head of Household or Qualifying Widow(er) filing status.
- You (and/or spouse if married) live in more than one state during the year?
- You (and/or your spouse if married) are legally blind.
- You, your spouse (if married) or any dependents you claim on your return had health insurance coverage purchased through the federal or a state insurance exchange. If so you will receive a Form 1095-A
- You and/or your spouse (if married) had foreign income.
- You had a household employees. (nannies, housekeepers, etc.)
- Received a first-time homebuyer credit in 2008.
- Direct Deposit for Refunds? If so provide routing & account numbers
- Form 1444 and 1444-B (If you received stimulus payments)

Income

- Wages, salaries, and tips Form W-2
- Unreported tip income
- Retirement income including Social Security Benefits
- Interest income statements Form 1099-INT
- Dividend income statements Form 1099-DIV
- State and/or local tax refunds.
- Alimony received if the divorce was final on or before December 31, 2018
- Sales of stock, etc. Form 1099-B
- Sales of real estate. (1099-S if applicable) If you sold your main home in which you owned and lived in at least two of the past five years and your gain was less \$250k (\$500 for married filing joint) and you were not issued a 1099-S, then you will not have to report the sale.
- IRA, Pension, or Annuity distributions Form 1099-R
- Sales of non-personal real estate Form 1099-S (if applicable)
- Received royalties (and expenses related to royalties)
- Income from Trusts, Partnerships, and S Corps Form K-1
- Unemployment compensation received.
- Social Security and/or Railroad Benefits
- Gambling Income Form W-2G (also win loss report from gambling establishment)
- Miscellaneous income (jury duty, other income, etc.)
- Business Income (See Business Checklist)
- Rental Income (See Rental Checklist)
- Farm Income (See Farm Checklist)

Adjustments to income. (Not Itemized Expenses)

- Educator Expenses (maximum of \$250 as an adjustment to income (\$500 if Married Filing Jointly and both spouses are educators) - remainder as Sch A deduction).
- Expenses of Reservists or Performing Artists
- HSA (not including employer contributions) Form 5498-SA and 1099-SA
- Moving Expenses
- Self-employed Qualified Retirement plans
- Health Insurance purchased through self-employed business
- Penalties for early withdrawal from savings (Usually a CD etc.)
- Alimony Paid for divorces finalized on or before December 31, 2018 (recipient's social security number is required)
- IRA contributions made
- Tuitions and Fees (may be used for tax credit instead)
- Tax Credits
- Foreign Tax paid
- Child or dependent care (insert definition)
- Paid tuition for yourself, spouse (if married), and/or any dependents claimed on your return.
- Contributed to an employer sponsored or other qualified retirement plan
- Energy improvements to your home.
- Estimates paid for Federal and/or State and/or Local income taxes

ITEMIZED DEDUCTION CHECKLIST

- Medical expenses for the family.
- Medical insurance paid.
- Prescription medicines and drugs.
- Doctor and dentist payments.
- Hospital and nurse payments.
- Long term care premiums (taxpayer and/or spouse)
- Miles traveled for medical purposes.
- State and local income taxes paid with last year's return and any estimates paid for state and local taxes paid in 2014.
- Sales taxes paid for large purchases.
- Real estate taxes paid.
- Personal property taxes paid.
- Home mortgage interest.
- Qualified Mortgage Insurance
- Home second mortgage interest paid.
- Interest paid on investments
- Cash contributions to charities.
- Fair market value of non-cash contributions to charities.
- Carryover of unused charity deduction.
- Unreimbursed expenses related to volunteer work.
- Miles traveled for volunteer purposes.
- Casualty and theft losses.
- Other Expenses