Income Tax Checklist

Taxpayer's name		SSN	
Spouse's name		SSN	
Taxpayer's occupation		Birthdate	Blind?
Spouse's occupation		Birthdate	Blind?
Taxpayer's Drivers License #	State	Issue Date	Exp Date
Spouse's Drivers License #	State	Issue Date	Exp Date

Address

Phone Taxpayer: Spouse:

Direct Deposit of Refund Bank Name: Routing #: Account#:

Did you receive, sell, send, exchange or acquire any financial interest in virtual currency? Y or N

DEPENDENTS

Full Name	SSN*	Birthdate	Relationship - # of days in home
1)			
2)			
3)			
4)			

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

PAPERWORK TO BRING

_____ W-2s _____ 1099-INTs _____ 1099-DIVs _____ Other 1099s

_____ K-1s _____ Property tax bill _____ Last year's tax return _____ 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

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.

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 ______________________	__________

* 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.