





REMINDER: Tax Return is due Tuesday, April 15, 2019

What I Need to File

| You | Spouse | Dependent | Personal Information |  |
|--------------------------|--------------------------|--------------------------|--|---|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Name, SSN or ITIN, and date of birth <u>for all listed on return</u> | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Last Year's Return - hard copy or PDF file (if new client) | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Estimated Taxes Paid (Form 1040ES) | |
| You | Spouse | Dependent | Income Documents Received |  |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Wage and tax statements - (Form W-2s) | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Stock Sales and Investment Reports - (Form 1099B) | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Interest & Dividends from Banking Institutions - (Forms 1099 DIV / INT / OID) | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Income from SCORP, Partnerships, Trusts - (Form K-1) | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Income from Pension / IRA - (Form 1099-R) | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Alimony Expense and/or Income | |
| You | Spouse | Dependent | Other Income Documents Received |  |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Sale of Home or Other Real Estate - (Form 1099-S) | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Health Savings Distribution & Contribution - (Form 1099-SA) | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Unemployment Compensation - (Form 1099-G) | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | State Sales Tax Refund - (Form 1099-G) | |
| You | Spouse | Dependent | Personal Deductions & Credits |  |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Mortgage Interest & Taxes - (Form 1098E) | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Health Insurance – includes health insurance marketplace statement - (1095-A), health coverage (1095-B) and employer-provided health insurance offer and coverage (1095-C) | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Child and Dependent Care Expenses (EIN or SSN for Provider required) | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Education Expenses - Tuition (Form 1098-T), Interest (Form 1098-E) | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Medical Expenses | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Vehicle (Personal Property Taxes) Paid - Car Registration Form | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Charitable Contributions | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Gambling Expenses (only if you have winnings) | |

