

2019 Personal Tax Data Info & Checklist

	taxpayer info	spouse info
Full Name		
Soc.Sec #		
Birthdate		
Email		
Phone work/home		
Cell phone		
Occupation		
Address		

	dependent 1	dependent 2	dependent 3	dependent 4
Full Name				
Soc.Sec #				
Birthdate				

- Form 8332 showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent

SOURCES OF INCOME

- All copies of W-2's, 1099's and K-1's
- Self-employed:** Income records to verify amounts not reported on 1099's
- Self-employed:** Expense records, asset info for depreciation, and home office information
- Self-employed:** Record of estimated tax payments made (Form 1040ES)
- Real Estate:** rental income & expenses (separated for each property)
- Retirement:** IRA / Pension Annuity income (1099-R)
- Retirement:** Social Security & RRB (1099-SSA, RRB-1099)
- Sale of Property:** Settlement/closing documents on sale & info on original purchase amount & date
- Expenses related to your investments
- Gambling income, Jury duty records, Hobby income and expenses, prizes and awards
- Trusts, Record of alimony paid/reived with Ex-spouses name and ssn

DEDUCTIONS

- Mortgage Interest paid:** Forms 1098 or other interest statements
- Property tax paid:** Real estate and personal property tax statements
- Energy credits:** Receipts for energy-saving home improvements
- Donations:** Cash and non-cash charitable donations (need receipts)
- Health care:** Amounts paid for healthcare insurance and to doctors, dentists, and hospitals
- Health care:** Forms 1095-A, B, C (comes from insurance companies or Obamacare)
- Health care:** Marketplace exemption certificate(ECN)
- Education:** Forms 1098-T (school tuition) & 1098-E (student loan interest)
- Education:** Receipts itemizing qualified educational expenses and records of scholarships
- Teachers:** Receipts from K-12 classroom expenses
- Employment related expenses (not reimbursed) such as mileage, gas, tolls, etc
- Job hunting expenses and moving expenses not reimbursed by employer
- Amount paid for to get last year's tax return created
- State/local income tax paid or amount of State/local sales tax paid. Also include invoice showin purchased vehicle tax paid
- Forms 5498-SA has contributions, 5498 IRA contributions, all other 5498 forms
- Childcare records (including the provider's tax ID number); Include all daycares and baby-sitters