

Document Checklist

New clients please provide us with a copy of last year's tax return.

Check all that apply and include documents

Income From:	Yes <input checked="" type="checkbox"/>		Yes <input checked="" type="checkbox"/>
Employer (W-2's)		Social Security / Retirement (1099-SA)	
Interest (1099-INT)		Unemployment (1099-G)	
Dividends (1099-DIV)		Rental Income / Farm Income *	
Retirement (1099-R)		Self-Employment Income (1099 Misc.) *	
Stock or Mutual Fund Sale (1099-B)		Forgiven /canceled debt1099A or 1099 C	

Credits:	Yes <input checked="" type="checkbox"/>		
College / Education expenses (1098-T)		Student Loan Interest (1098-E)	
Must have 1098 T issued by school		Child Care Expenses (Babysitting)	

Deductions:	Yes <input checked="" type="checkbox"/>	In order to file itemized deductions (long form) these deductions would need to exceed the new standard deductions for 2019 tax year.	
Home mortgage interest (1098)			
Real estate taxes paid		Single	\$12,200
Personal property taxes paid		Head of Household	\$18,350
Contributions to charities		Married Joint	\$24,400
Medical expenses for the family			

Miscellaneous	Yes <input checked="" type="checkbox"/>		Yes <input checked="" type="checkbox"/>
Take an IRA or 401K distribution?		Form 1095 –A Marketplace Health Insurance	
Pay /Receive alimony?		Have gambling winnings?	
Sell or buy a home in 2019?		Receive the first time homebuyers credit in any previous year?	