

# 2019 INCOME TAX CHECKLIST

## INCOME/INSURANCE ITEMS

- \_\_\_\_\_ W2 from employer(s)
- \_\_\_\_\_ 1099-SSN (Social Security)
- \_\_\_\_\_ 1099-MISC (Self Employment)
- \_\_\_\_\_ 1099-R (Retirement)
- \_\_\_\_\_ 1099-G (Unemployment)
- \_\_\_\_\_ 1099-DIV, INT (Investments)
- \_\_\_\_\_ 1099-B (Sale of assets)
- \_\_\_\_\_ 1095-A (Healthcare)
- \_\_\_\_\_ 1095-B (Healthcare)
- \_\_\_\_\_ 1095-C (Healthcare)
- \_\_\_\_\_ W2G (Gambling/prize income)
- \_\_\_\_\_ State / City prior-year refunds
- \_\_\_\_\_ Rental income
- \_\_\_\_\_ K1 from trust or partnership
- \_\_\_\_\_ Alimony received
- \_\_\_\_\_ Jury duty pay

## DEDUCTION ITEMS

- \_\_\_\_\_ Unreimbursed medical and dental expenses
- \_\_\_\_\_ State and local taxes paid
- \_\_\_\_\_ Home mortgage interest
- \_\_\_\_\_ Property and real estate taxes
- \_\_\_\_\_ Gifts to charity
- \_\_\_\_\_ Clothing donations
- \_\_\_\_\_ Education expenses (1098T)
- \_\_\_\_\_ Student loan interest
- \_\_\_\_\_ Child-care expenses
- \_\_\_\_\_ Alimony paid
- \_\_\_\_\_ IRA contributions
- \_\_\_\_\_ Health Savings Account (HSA) contributions + distributions
- \_\_\_\_\_ Self employment work expenses
- \_\_\_\_\_ Rental expenses
- \_\_\_\_\_ Solar or Geothermal property costs

**\* Please bring the following:**

- (1) Drivers License
- (2) Dependent information (Social Security Number, Birthdates)
- (3) Bank account information for direct deposit