

What Info Do I Need to Turn in to **Get My Taxes Done?**

## ***Tax Return Checklist***

### **Personal Information**

- ☐ Your social security number or tax ID number
- ☐ Your spouse's full name and social security number or tax ID number
- ☐ Copy of driver's licenses
- ☐ Your tax return for the previous year

### **Information About Other People Who May Belong on Your Return**

- ☐ Dates of birth and social security numbers or tax ID numbers
- ☐ Income of other adults in your home
- ☐ Form 8332 showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent (if applicable)

### **Education Payments**

- ☐ Forms 1098-T from educational institutions
- ☐ Receipts that itemize qualified educational expenses
- ☐ Records of any scholarships or fellowships you received
- ☐ Form 1098-E if you paid student loan interest

### **Employee Information**

- ☐ Forms W-2

### **Self-Employment Information**

- ☐ Forms 1099-MISC,
- ☐ Income records to verify amounts not reported on 1099s

- ☐ Listing of all expenses from check registers or credit card statements, and receipts
- ☐ Business-use asset information (cost, date placed in service, etc.) for depreciation
- ☐ Office in home information (square footage of property and square footage of office space, expenses by category)

### **Business Use of Vehicle Information**

- ☐ Total mileage for business vehicle driven in 2019, and total **business miles** driven (from mileage logs showing business miles driven for the year, or beginning/ending odometer readings) other than commuting miles. Your mileage logs should have the purpose of the business mileage.
- ☐ Amount of parking and tolls paid
- ☐ If you want to claim actual expenses, receipts or totals for gas, oil, car washes, licenses, personal property tax, lease or interest expense, etc. Mileage as indicated above is still needed.

### **Rental Property Income**

- ☐ Listing of all income and categorized expenses
- ☐ Rental asset information (cost, date placed in service, etc.) for depreciation

### **Retirement Income and Contributions**

- ☐ Pension/IRA/annuity income (1099-R)
- ☐ Social security/RRB income (1099-SSA, RRB-1099)
- ☐ Form 5498 showing IRA contributions
- ☐ Traditional IRA basis (i.e. amounts you contributed to the IRA that were already taxed)

### **Savings and Investments**

- ☐ Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
- ☐ Income from sales of stock or other property (1099-B, 1099-S)
- ☐ Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B)

### **Other Income and Expenses**

- ☐ Amount of any alimony paid and ex-spouse's full name and social security number

- Unemployment, state tax refund (1099-G)
- Gambling income (W-2G or records showing income, as well as expense records)
- Amount of any alimony received
- Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
- Form 5498 showing HSA contributions
- Jury duty income
- Receipts for classroom expenses (for educators in grades K-12)
- Moving expenses

### **Healthcare / Affordable Care Act**

- Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange). Other insurance proof is no longer required.

### **Itemized Deductions (over the limits below)**

The standard deduction for 2019 is:

- \$12,200 for singles and married couples filing separately
- \$18,350 for heads of household (must have children)
- \$24,400 for married couples filing jointly

If your total itemized expenses exceed these amounts, then please the following:

- Medical expenses by Category (Rx, doctors, insurance, medical mileage, glasses )
- Forms 1098 or other mortgage interest statements  All other 1098 series forms
- Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
- Real estate and personal property tax records
- Invoice showing amount of vehicle (or other large item purchased) sales tax paid
- Cash or check amounts donated to houses of worship, schools, other charitable organizations
- Records of non-cash charitable donations
- Charitable mileage

### **Child Care**

- Childcare expenses, by child (including the provider's name, tax ID number, and address) if applicable

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