1040 2019 Tax Checklist for Individual Income Tax Return

Prepared by Your Tax Matters LLC

Basic Information

- ☐ Names, SSN, birth dates of the family
- ☐ Address, phone number, e-mail address
- ☐ 2018 income tax return copy
- ☐ ID (SS cards and Driver's License, etc.) *

Income

- ☐ All W2's including foreign wage report
- ☐ 1099-MISC (contracting, self-employment, rental income)
- ☐ 1099-INT and 1099-DIV (interest and dividends from financial institutions)
- ☐ Rents and royalties (if you did not receive 1099-MISC)
- ☐ 1099-B Sales of stock, mutual funds, residence and other properties
- ☐ 1099-R (Pension and annuity distributions) and SS-1099/RR-1099 (Social Security/Railroad Retirement benefits)
- ☐ 1099-R Roth IRA conversion
- ☐ Alimony received (payer SSN)**
- ☐ Business and farm income and expenses (see also small business checklist)
- ☐ Sale of assets
- ☐ State and local income tax refunds
- ☐ Unemployment and jury duty income
- ☐ K-1 tax from S-Corp, partnership or trust
- ☐ Scholarships and fellowships
- ☐ Other misc. income including gambling and lottery winnings (W2-G)

Deductions and Credits

- ☐ Educator expenses
- ☐ HSA, IRA , SEP IRA, SIMPLE contributions
- ☐ Retirement account report
- ☐ Student loan interest paid
- ☐ Alimony paid (payee SSN) **
- ☐ Foreign income and taxes paid (copy of foreign tax returns)
- ☐ Foreclosure, short sale, bankruptcy information if any
- ☐ Domestic production Form 8903
- ☐ Itemized Deduction Information **
  - Medical, dental and vision expenses and mileage
  - Health and long term care insurance premium paid
  - Casualty and theft losses
  - State and local income tax and sales tax paid
  - Real estate tax
  - Home mortgage interest and points
  - Personal property taxes (AZ Automobile registration, etc.)
  - Charitable contributions and mileage
  - Investment interest paid
- ☐ Health insurance premium report - 1095
- ☐ Foreign income tax return or tax information
- ☐ Foreign bank and investment account values and assets information
- ☐ Child and dependent care expenses
- ☐ Post-high school level education - tuition and expenses
- ☐ Investment and business related expenses (may not be deductible)
- ☐ Federal income tax payments
- ☐ AZ school credit, property tax credit(140PTC),other AZ tax credits
- ☐ Other state income tax related credit or deduction information

* - for professional tax preparer appointment ** - 2018 tax law changes

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