Tax Prep Checklist for 2019 Tax Year

KK Tax Service
409 N Main St, PO Box 2, Alma, WI 54610

Personal Information:

- ☐ Your social security number or tax ID number
- ☐ Your spouse's full name and social security number or tax ID number
- ☐ Photo ID for Taxpayer (and Spouse)

Dependent(s) Information:

- ☐ Dates of birth and social security numbers or tax ID numbers
- ☐ Childcare records (including the provider's tax ID number) if applicable
- ☐ 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)

Income

Employed

- ☐ W-2 Form(s)

Unemployed

- ☐ Unemployment records, state tax refund (1099-G)

Self-Employed

- ☐ 1099 Form(s), Schedule K-1(s), income records to verify amounts not reported on 1099s
- ☐ Records of all expenses (i.e., check registers, credit card statements, and receipts)
- ☐ Business use asset information (cost, date placed in service, etc.) for depreciation
- ☐ In home office information
- ☐ Record of any estimated tax payments made (1040-ES forms)

Rental Income

- ☐ Record of income and expenses
- ☐ Rental asset information (cost, date placed in service, etc,) for depreciation
- ☐ Record of estimated tax payments made (1040-ES forms)

Retirement Income

- ☐ Pension/IRA/Annuity income (1099-R)
- ☐ Traditional IRA basis (amounts contributed to an IRA that were already taxed such as in a Roth IRA)
- ☐ Social Security/RRB Income (1099-SSA, RRB-1099)

Savings, Investments, and Dividends

- ☐ 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 costs or other basis in property you sold (if basis is not reported on 1099-B)
- ☐ Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
- ☐ Expenses related to your investments
- ☐ Record of estimated tax payments made (Form 1040-ES)

Other Income and Losses

- ☐ Gambling Income (W-2G or records showing income as well as expense records)
- ☐ Jury duty records
- ☐ Hobby income and expenses
- ☐ Prizes and awards
- ☐ Trusts
- ☐ Royalty Income (1099-Misc.)
- ☐ Any other 1099s received
- ☐ Record of alimony paid/received with ex-spouse’s name and SSN

Deductions

Home Ownership

- ☐ Forms 1098 or other mortgage interest statements
- ☐ Real estate and personal property tax records
- ☐ Receipts for energy-saving home improvements (i.e., solar panels, solar hot water heater)
- ☐ Any other 1098 forms

Charitable Donations

- ☐ Cash amounts donated to houses of worship, schools, other charitable organizations
- ☐ Records of non-cash charitable donations
- ☐ Records of miles driven for charitable purposes

Medical Expenses

- ☐ Amounts paid for healthcare insurance and to doctors, dentists, hospitals

Health Insurance

- ☐ Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange)
- ☐ Form 1095-B and/or 1095-C if you had insurance coverage through any other source (i.e., an employer, insurance company, or government health plan such as Medicare, Medicaid, CHIP, TRICARE, VA, etc.)
- ☐ Marketplace exemption certificate (ECN) if you applied for and received an exemption from the Marketplace (Exchange)

Childcare Expenses

- ☐ Fees paid to a licensed day care center or family day care for care of an infant or preschooler
- ☐ Wages paid to a babysitter

  Do NOT include expenses paid through a flexible spending account at your work

Educational Expenses

- ☐ 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

K-12 Educator Expenses

- ☐ Receipts for classroom expenses (for educators in grades K-12)

State and Local Taxes

- ☐ Amount of state and/or local income tax paid (other than wage withholding), or amount of state and local sales tax paid
- ☐ Invoice showing amount of vehicle sales tax paid

Retirement and Other Savings

- ☐ Form 5498-SA showing HAS contributions
- ☐ Form 5498 showing IRA contributions
- ☐ All other 5498 series forms (5498-QA, 5498-ESA)

Federally Declared Disaster

- ☐ City/County you lived/worked/had property in
- ☐ Records to support property losses (appraisal, cleanup costs, etc.)
- ☐ Records of rebuilding/repair costs
- ☐ Insurance reimbursements/claims to be paid
- ☐ FEMA assistance information
- ☐ Check FEMA to see if my county has been declared a federal disaster area