RMS
FINANCIAL SERVICES
WWW.RMSFINANCIALSERVICES.COM

12672 Limonite Avenue, Suite 3E-213
Eastvale, CA 92880
Phone: (951) 444-0727
Cell: (909) 815-2061
Fax: (951) 790-1213

CHECKLIST – 2019 PERSONAL TAX RETURN

Please use this list to make sure that you have all records, cancelled checks, and receipts so preparation of your income tax return can be done accurately.

- ☐ A copy of last years Federal and State Tax Returns, if new client
- ☐ All W2's, 1099's, and Social Security year-end statements
- ☐ Dependents name, social security numbers, and date of birth
- ☐ Records of other income and expenses:
  - Real Estate Documents
    - Sale, Purchase, Refi, Foreclosures
  - Mortgage Interest Paid Statement
  - Sale of Assets (Buy & Sell Date & Prices)
  - Stock (Buy & Sale Dates & Prices)
  - Interest Income
  - Moving Costs
  - Rental Income/Expenses
  - Dividend Income
  - Small Business P/L Statement
- ☐ Charitable contributions: cash and non-cash
- ☐ Amounts/date paid for estimated taxes and/or extension, if any
- ☐ Taxes paid: Property Tax, Sales Tax, DMV fees, Local Utility, Car Purchase Contracts
- ☐ Energy Credit: Electric/Hybrid Vehicle or Energy Efficient Home Improvements
- ☐ Medical, dental, and vision expenses including form 1095-A if applicable
- ☐ Major losses sustained: accident, fire, theft, etc.
- ☐ Child care expenses: include name, address, social security number or EIN number of providers, and phone numbers
- ☐ Education expenses: tuition, books, and supplies for college for yourself and/or dependent including form 1098-T

Once you have completed your checklist and scheduled your appointment, please ensure to:

1. Contact us for any questions or concerns.
2. Bring your documents and we will review them during your appointment.
3. Bring a check for Direct Deposit information.