SCHULTZ Tax Services

2019 TAX RETURN PREPARATION CHECKLIST

Thank you for selecting me as your tax preparer. I appreciate your trust and confidence!

Here's a list of common documents needed to prepare your tax return. Not all of these document types will apply to your situation. If in doubt, toss it in, and we will review it.

PERSONAL INFORMATION

- ☐ Your 2018 individual tax return (Form 1040 including all pages (plus state return))
- ☐ Copy of driver's license(s) for you (and your spouse, if applicable)

INCOME

- ☐ W2 From employers

Interest, Dividends or Investment Income

- ☐ 1099-INT Interest income from banks, credit unions, or brokers
- ☐ 1099-DIV Dividend income from banks, credit unions, or brokers
- ☐ 1099-B Income from sales of stock or mutual funds
- ☐ 1099-SA Health Savings Account
- ☐ Tell me if you bought or sold a property in 2019.
- ☐ Tell me if you had a bank account outside of the U.S. in 2019.

Retirement Income

- ☐ 1099-R Pension/IRA/annuity income (including 401(k) withdrawals)
- ☐ SSA-1099 Social Security income
- ☐ Tell me if you contributed to, or plan to contribute to, an IRA for tax year 2019.

Other Income

- ☐ 1099-G Unemployment income
- ☐ 1099-G State tax refund from the prior year
- ☐ 1099-MISC Royalty income and other income

- ☐ Tell me if you had other income such as jury duty, prizes, alimony, etc.
- ☐ If you made estimated tax payments, provide the dates and amounts of payments.
- ☐ Tell me if you bought or sold a property in 2019.
- ☐ If you are Self-Employed or have Rental Properties, please provide all income (including 1099-MISC and 1099-K forms) and expense records.
- ☐ Provide a recent pay stub(s) for 2020 so we can review your tax withholding and adjust for 2020, if needed.

DEPENDENT(S) INFORMATION

- ☐ Dates of birth and SSN of dependents
- ☐ Amounts paid for childcare (including the provider's tax ID number)

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DEDUCTIONS

Standard deduction amounts for 2019:

- $12,200 Single
- $24,400 Married Filing Jointly
- $18,350 Head of Household
- $12,200 Married Filing Separately

If you think you will have deductions over your standard deduction, then please provide the following documents where applicable:

Home Ownership

- ☐ Mortgage interest statements (Form 1098)
- ☐ Real estate taxes paid

Charitable Contributions

- ☐ Cash amounts donated to charitable organizations
- ☐ Records of non-cash charitable donations
- ☐ Miles driven for charitable purposes

Medical Expenses (*subject to threshold of 7.5% of Adjusted Gross Income (AGI)*)

- ☐ Amounts paid for healthcare/dental/vision insurance and to doctors, dentists, hospitals, prescription drugs, medical devices, etc.
- ☐ Miles driven for medical purposes

State & Local Taxes

- ☐ Personal property taxes paid (ad valorem taxes for vehicles (this doesn't apply in FL))
- ☐ Invoice showing amount of sales tax paid on a vehicle or boat

"Above-the-line" and other deductions

These apply even if you claim the standard deduction rather than itemizing your deductions.

Educational Expenses

- ☐ 1098-T For tuition and other amounts paid to educational institutions
- ☐ 1098-E For student loan interest paid
- ☐ Receipts that itemize qualified educational expenses
- ☐ Records of any scholarships or fellowships received

Retirement & Other Savings

- ☐ 5498 or 5498-SA Showing IRA or HSA contributions

Health Insurance

- ☐ 1095-A Tell me if you obtained health insurance from the Exchange (Marketplace, www.heathcare.gov, or Obamacare)