



RUSH
TAX SPECIALISTS
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TAX FORM CHECKLIST

What Most People Need:

Personal Information

This information tells the IRS who is filing, what dependents you're claiming, and where to deposit your refund.

- ☐ **Social Security numbers and birth dates for you, your spouse, and all dependents**
- ☐ **Copy of your last years return ONLY IF you are a new client, or if you are newly married.**
(spouse's last years return so we can combine the two of you)

Income Information

- ☐ **W-2 forms for both husband and spouse**
- ☐ **1099-C forms for cancellation of debt**
- ☐ **1099-G for unemployment and/or gambling winnings**
- ☐ **1099-R forms for distributions from retirement accounts and stocks**
- ☐ **SSA-1099 forms for reporting Social Security Benefits**
- ☐ **Alimony paid or received (agreements dated prior to Jan 1st, 2019) need ex-spouse's social security #**
- ☐ **Forms: 1099-INT, 1099-DIV, 1099-B, 1099-K**
- ☐ **Form K-1 (from Trusts, Estates, Partnerships, Corporations, etc.)**
- ☐ **Miscellaneous Income: jury duty, prizes, raffle winnings, etc.**

Adustments To Your Income

The following items may reduce the amount your income is taxed, which can increase your refund or how much you owe.

- | | |
|--|--|
| <input type="checkbox"/> 1098-E (interest on student loans) | <input type="checkbox"/> MSA contributions |
| <input type="checkbox"/> 1098-T (tuition payments) | <input type="checkbox"/> SEP, KEOGH SIMPLE, contributions |
| <input type="checkbox"/> Self employed health ins. premiums | <input type="checkbox"/> 1098-SE (HSA dist. for health savings account) |
| <input type="checkbox"/> Teachers: classroom supplies | |
| <input type="checkbox"/> Tradional IRA contributions | |
| <input type="checkbox"/> Invoice paid for energy-efficient improvements | |

Alimony paid (recipient social security number req.)

If you itemize your deductions

IRS offers a number of credits and deductions to help lessen the tax burden on individuals, which means more money in your pocket! You will need the following documentation to make sure you get all the credits and deductions you deserve.

- ☐ Daycare costs: provider's name, address, social security or EIN number req.
- ☐ Medical expenses:
prescriptions, medicare part B/C/D, supplemental insurance premiums,
dr. bills, co-pays, hospital care, medical supplies, mileage, parking, dental,
eye exams, therapy, etc.

Please note: We only need totals for each category. Please don't provide us with receipts.

- ☐ 1098-INT Mortgage interest statement
- ☐ Property tax statement
- ☐ License registration tabs for: vehicles, boats, campers, trailers, motorcycles
- ☐ Sales tax on: new vehicles, boats, trailers, campers, trailers, motorcycles
- ☐ Settlement Statement/Closing Disclosure on refinancing, or new home purchase
- ☐ Charitable Contribution itemized list (see our website), receipt from charity
- ☐ Charitable mileage total _____
- ☐ Gambling losses (limited to up-to-your winnings)
- ☐ K-12 school expenses including: tuition, supplies, computers, calculators,
tutoring, educational camps and programs,
drivers ed, music lessons & inst. rental, dance

Please note: sports-related expenses do not qualify

- ☐ Self-Employed office in the home expenses

Please provide: Total home square footage _____, sqft area used for business only _____

- | | |
|--|--|
| <input type="checkbox"/> Total heating costs | <input type="checkbox"/> Lawn care supplies or service |
| <input type="checkbox"/> Total electricity costs | <input type="checkbox"/> Snow removal |
| <input type="checkbox"/> Home owner's or renter's insurance paid | <input type="checkbox"/> Security system and service |
| <input type="checkbox"/> Cable TV | <input type="checkbox"/> HOA fees (association fees) |
| <input type="checkbox"/> Repairs/upgrades to home | |

- ☐ Estimated tax payments made through year federal _____ state _____
- ☐ Foreign bank account information: location, name of bank, bank account number