

2019 CHECKLIST FOR ACCURATAX LLC

Please check the items you provide to Accuratax!

Name _____

Address _____ City _____ Zip _____

Phone No. _____ Email _____

***** NOTE: NEW CLIENTS - NEED TO PROVIDE A COPY OF 2018 TAX RETURN**

Income and deductions

- W2 Forms (Wages)
- 1099_MISC (Contract Work)
- 1099-INT or December Bank Statement (Banking Interest)
- Last year's State Refund Card
- Unemployment (Form 1099-G)
- Retirement Benefits (1099-R)
- Social Security Benefits
- Alimony received
- Daycare expenses (Need daycare EIN & Address)
- College Education loan interest
- College Education Expenses for dependents (1098T and books/materials)
- Educators Credit (Limit of \$250 school supplies)

IF YOU OWN A HOME AND/OR ITEMIZE

- 1098 (House Interest & Home Mortgage Insurance)
- Property taxes (2018 taxes paid in 2019)
- Cash contributions paid to Non-Profits
- Gift contributions given to Non-Profits
- Medical Expenses - (ONLY Out of Pocket) NOTE: CANNOT BE FUNDS PAID BY HSA.
- Long Term Care Payments

STOCK, MUTUAL FUNDS, or IRA's

- 1099-B if you sold mutual funds or stock (Need Sell & Buy amounts)
- 1099-DIV if you receive dividends from Mutual Funds or Stock
- IRA & Roth Contributions for 2019
- HSA Contributions and Distubutions for 2019 (Individual or Family)

HEALTH INSURANCE INFORMATION (OBAMA CARE)

Were you covered Obamacare or Marketplace Insurance? Yes ___ No ___

NOTE: If you used a Marketplace you need Form 1095-A must be provided to complete your return.

Business Questions

Name of Business _____

EIN or Social Security Number _____

Describe Business _____

- ___ Date started business
- ___ Income for the year
- ___ Advertising
- ___ Contract Labor
- ___ Payroll & Payroll Taxes
- ___ Office expenses
- ___ Rent or Leases paid
- ___ Taxes & Licenses
- ___ Travel expenses
- ___ Meals & Entertainment WITH CLIENTS
(You get 50% of these expensed - as a rule)
- ___ Meal & Entertainment WITH EMPLOYEES (100%)
- ___ Gifts to Clients (Limit is \$25 per client)
- ___ Interest or Penalties on any loans or credit cards for business.
- ___ Legal & Professional expenses
- ___ Cell phone or Business phone expenses (reasonable % for Business)
- ___ Internet (reasonable % used for Business)
- ___ Repairs and Maintenance
- ___ Tools and/or Material expenses
- ___ Insurance expense (Business Insurance Only) (Medical Premiums seperately)
- ___ Other

VEHICLE EXPENSES - Any vehicle expenses need miles log.

- ___ Vehicle Year and Model
- ___ Purchase Price
- ___ Date vehicle put in business
- ___ Odometer reading beginning of year and end of year
- ___ (Miles Method) Business miles driven / Personal miles driven
- ___ (Actual Expenses Method)-(Gas, Oil, Insurance, License, Maintenance)
NOTE: Need miles driven for the business with both methods.

HOME OFFICE EXPENSE

- ___ Full House square footage
- ___ Home Office square footage
- ___ House Market Value at time business started
- ___ Land value at time business started
- ___ Cost of any major improvements to property this year
- ___ Utilities (Gas, Electric, Trash)
- ___ House Insurance
- ___ Rent paid

AccuraTax LLC Tax and Bookkeeping

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