

Roybal's Income Tax Service
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Certified Registered Tax Preparers (CRTP)
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Checklist - 2019 Tax Return

GENERAL INFORMATION & INCOME:

- ___ 1. Copy of last year's Fed & State Tax Returns (**New Clients Only**)

- ___ 2. Copy of Drivers License/State Issued ID or you may write down your Driver's License number, date issued, and expiration date. (**New Clients Only** or if you did not submit last year).

- ___ 3. Taxpayers and Dependent's Social Security Numbers, Full Names (as they appear on Soc.Sec. Card), and Birthdates. (**New Clients** or for a **New Dependent**)

- ___ 4. **All Income Statements:** W-2's, 1099's, Social Security, Unemployment, Retirement (1099-R)

- ___ 5. **Records of Other Income and Expense:** Sale of Property (Escrow papers-Final Closing Statement/HUD-1 and list of improvements), Rental Income & Expenses, Investment Interest, Dividend Income, Sale of Stocks, Farm Income.

DEDUCTIONS:

- ___ 6. **Medical Costs:** Total Out-of-Pocket expenses paid for doctor, dentists, eye glasses & exams, lab fees, monthly premiums, prescriptions and travel (mileage). (Must total over 7.5% of gross income to be deductible)

- ___ 7. **Property Tax Statements, Sales Tax (large items), DMV fees, Car Purchase Contracts.**

- ___ 8. **Interest Paid:** Mortgage Statement (Form 1098). Escrow Papers (Final Closing Stmt-HUD 1) for purchase, sale or refinance of properties.

- ___ 9. **List of Contributions:** to Charities and Religious Organizations. (by Cash/Check & Non Cash-Thrift Store Value of Items)

- ___ 10. **Employment Expenses (For Self Employed Tax Payers and State Tax Filers only – as of 2018, W2 wage earners can no longer take a deduction for employment expenses on the federal tax return):** Safety Equip. (shoes, gloves, etc.), Uniforms & Protective Clothing, Laundering of Uniforms, Tools & Supplies, Travel, Auto Expenses (business mileage), Cell Phone, Etc. all totaled in categories.

OTHER - MISCELLANEOUS:

- ___ 11. **Child Care Expenses:** \$ Amt paid, Name, Address, Phone, Social Sec.# or Tax ID# of provider.

___12. **College Tuition** (Taxpayers and Dependents): \$ Amount paid for Tuition (Form 1098-T) and Year of College (i.e., freshman, sophomore, etc.), \$ amount for books/supplies/computers, if required for course.

___13. **Health Insurance** – As of tax year 2019, there is no longer a penalty fee for not having health insurance. However, if you have health insurance through Covered CA or The Exchange, you must provide the 1095-A form on your tax return.

___14. **Losses Sustained:** Accidents, Fire, Theft, etc. (Out of Pocket Expense must total over 10% of gross income to be deductible.)

___15. **Credits:** Plug in vehicles (new vehicles only-bring contract) and Solar Panels (purchased only, not leased, please bring your purchase contract)

___16. **Automatic Deposit of Refund** – Bank Name, Account #, Routing Number and Type of Account (i.e. checking or savings, include a cancelled check, if possible.)

CUT OFF DATE FOR MAIL-IN & DROP-OFF RETURNS IS MARCH 25th, 2020 TO GUARANTEE COMPLETION BY the APRIL 15th, Tax Deadline!

Electronic Filing (e-file). Your refund will be deposited into your account or a check will be mailed to you within **approximately 14 business days** of submission...No additional fee charged for e-file.

Fees: State & Federal Income Tax Prep. Long forms **starting at \$140**, EZ Forms **starting at \$60**, Short Forms 1040A/540A **starting at \$70**, and Corporate Returns and LLC's **starting at \$200**.

Long Forms include Federal and/ or State filing with Itemized Deductions (Sch. A), & Interest Income (Sch. B). There may be **additional fees** for additional forms such as: Education Credit, EIC and Child Care Credit Business Income & Expense (Sch. C), Rental Income (Sch .E), Depreciation, and Sale of Property or Stocks (Sch. D), etc.

Additional fees for copies, mailing & downloading.

- 1) Copies - \$5 for each year requested
- 2) Mail Out Returns - \$5 shipping & handling flat fee for all paperwork mailed by regular USPS mail and Actual Charges for USPS Priority Mail, UPS Ground and Fed X mailings – **NOTE: Returns completed and mailed out to clients will **not** be electronically filed until the signed E-File Authorization and Payment is received.**
- 3) Downloading multiple pages and documents - \$10+ (we will notify you for approval before downloading)

Payment – made at final pick-up of paperwork or at appointment by CASH, CHECK, OR CREDIT CARD/DEBIT CARD (\$1 additional fee for Credit & Debit Cards). We ACCEPT Visa, Mastercard & Discover cards ONLY.

Office Hours: During the Tax Season – January 20th through April 14th, 2020

