



JACK@JLSWOFFORDLTD.COM
(717) 333-5389

INCOME TAX PREPARATION INFORMATION CHECKLIST

For any information relating to names, SSNs, and dates of birth, that was previously supplied and is unchanged, write: "Same as before", or "Same".

Taxpayer Name _____ SSN: _____ Date of Birth _____
Spouse Name _____ SSN: _____ Date of Birth _____
Phone Number(s) _____ Occupation(s) _____
Address _____

(If moved, please list both old and new address and date moved on separate sheet of paper)

| Name of Dependent | SSN | Date of Birth | Months lived with this tax year |
|-------------------|-------|---------------|---------------------------------|
| 1 _____ | _____ | _____ | _____ |
| 2 _____ | _____ | _____ | _____ |
| 3 _____ | _____ | _____ | _____ |
| 4 _____ | _____ | _____ | _____ |

(if more than 4 dependents, please use a blank sheet of paper following the same format)

Estimated Tax Payments Made:

| | Federal | State | Local |
|-----------------|---------|-------|-------|
| 1 due 4/15/2019 | _____ | _____ | _____ |
| 2 due 6/15/2019 | _____ | _____ | _____ |
| 3 due 9/15/2019 | _____ | _____ | _____ |
| 4 due 1/15/2020 | _____ | _____ | _____ |

The new higher standard deductions mean fewer people will itemize.

NEW CLIENTS ONLY:

- Copy of last year's tax returns (Federal, State, Local (if any))
- Copy of drivers license (BOTH if married filing jointly)

INCOME:

- Wages (Form W-2)
- Retirement Distributions (Form 1099-R)
- Income from Partnership, S-Corp, or Estate (Form K-1)
- Unemployment (Form 1099-G)
- Social Security (Form SSA-1099)
- Bank Interest (Form 1099-INT)
- Investments (Form 1099-DIV or Consolidated 1099 from Broker)
- Gambling or Lottery winnings (Form W-2G)
- Income from a Foreign Employer
- Cancellation of Debt (Form 1099-C)
- Self-Employment (full or part-time) (Form 1099-NEC and/or 1099-K) **SEE: SELF-EMPLOYMENT below**
- Rental Properties you own (SEE)
- Sale of Property or Assets (Form 1099-B)
- Sale of Personal Residence (Form 1099-S)
- Miscellaneous Income (Form 1099-MISC)
- Distributions from an HSA account (Form 1099-SA)
- Jury Duty or Election Poll Worker pay (check stub from court or county)



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ADJUSTMENTS:

- Student Loan Interest you paid (Statement from Lender)
- Educator expenses not reimbursed by school district (*Educators ONLY*)
- Contributions you made to an IRA or Roth IRA (**NOT payroll deductions into a 401K**)

HEALTH CARE COVERAGE:

- If you have Obamacare health insurance from Marketplace (Form 1095-A)

EDUCATION EXPENSES:

- Tuition you paid (Form 1098-T)

DEDUCTIONS:

- Mortgage Interest you paid (Form 1098)
 - Real Estate taxes you paid (if not paid through mortgage)
 - Other taxes you paid (Occ Privilege, Ad Valorem, etc.)
 - Healthcare expenses you paid out of pocket (Co-pays, etc.)
 - Cash donations to IRS registered charities (Church, etc.)
 - Non-Cash donations to IRS registered charities (Goodwill, etc.)
- Employment Expenses** (*non-reimbursed* work clothes, union dues, safety equipment, tools, etc.)

SELF-EMPLOYMENT and FARMING:

- List of Income and Expenses from self-employment (if using accounting software, a Profit & Loss Statement dated Jan 1 through Dec 31 of this tax year)
- Mileage record **for business mileage ONLY**

RENTAL INCOME:

- List of Income and Expenses (mortgage interest, real estate taxes, repairs, rental permit fees, HOA dues (if any), etc.) from rental property(ies)
- Mileage record **for rental mileage ONLY**
- Rental Property info (address, date purchased, purchase price, etc.) (*unless we already have it on file*)

STATE USE TAX:

- Any letter, form, etc. you received from a retailer (online or otherwise) for making an out-of-state purchase without paying PA sales tax

REFUNDS:

If you get a refund:

Would like your refund direct deposited into your bank account?

(Check one) YES _____ NO _____

- Voided check from bank account you want your refund direct deposited into (*unless we already have it on file*)

PAYMENTS:

If you owe taxes:

Would like your payment direct debited from your bank account?

(Check one) YES _____ NO _____

- Voided check from bank account you want your payment direct debited from (*unless we already have it on file*)