



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) **NOTE: IF YOU WORKED ANY OVERTIME DURING THE YEAR, WE NEED A COPY OF YOUR LAST PAYSTUB FOR THE TAX YEAR**
- 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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## INCOME TAX PREPARATION INFORMATION CHECKLIST

### 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 tax receipts marked "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*)