

# Document Checklist

New clients please provide us with a copy of last year's tax return.

Check all that apply and include documents

Income From:	Yes		Yes
Employer (W-2's)		Social Security / Retirement (1099-SA)	
Interest (1099-INT)		Unemployment (1099-G)	
Dividends (1099-DIV)		Rental Income / Farm Income *	
Retirement (1099-R)		Self-Employment Income (1099 Misc.) *	
Stock or Mutual Fund Sale ( 1099-B)		Forgiven or canceled debt (1099A or 1099 C)	

Credits:	Yes		
College / Education expenses (1098-T)		<i>Must have 1098 T issued by school</i>	
Student Loan Interest (1098-E)			
Child Care Expenses ( Babysitting)			

Deductions:	Yes	In order to file itemized deductions (long form) these deductions would need to exceed the new standard deductions for 2018.	
Home mortgage interest ( 1098)			
Real estate taxes paid		Single	\$12,400
Personal property taxes paid		Head of Household	\$18,650
Contributions to charities		Married Joint	\$24,800
Medical expenses for the family			

Miscellaneous	Yes		Yes
Take an IRA or 401K distribution?			
Pay /Receive alimony?		Have gambling winnings?	
Sell or buy a home in 2020?		Receive the first time homebuyers credit in any previous year?	