



Individual Tax Checklist

Tax Year: 2018

GENERAL INFORMATION

	Legal Name	SSN	D/O/B	Occupation
Taxpayer	_____	_____	_____	_____
Spouse	_____	_____	_____	_____
Address	_____			
Telephone	_____	Email address		_____

Bank Information for Direct Deposit/ACH	Bank Routing Number	Account Number
	_____	_____

	Legal Name	SSN	D/O/B	Relationship
Dependents				
Dependent	_____	_____	_____	_____
Dependent	_____	_____	_____	_____
Dependent	_____	_____	_____	_____
Dependent	_____	_____	_____	_____

Child Care Provider's Name _____

Child Care Address _____

Child Care Tax ID Number _____ Amount paid \$ _____

How would you like to receive your copy of the Tax Return (check one or both)

Printed Electronic

PERSONAL INFORMATION

- Yes No Did your marital status change during the year?
- Yes No Did your address change during the year?
- Yes No Were there any increases or decreases to the number of dependents?
- Yes No Did you have any children under age 19 or full-time students under age 24 at the end of the tax year who had interest/dividend income of \$950 or other investment income?
- Yes No Did you have health insurance this year? If so, how many months were you covered? _____
- Yes No During the year, did you go without health insurance for any period greater than two months? If yes, please provide reasons on separate sheet. *(If you have received Form 1095, please attach.)*

INCOME ITEMS (Please attach relevant documents)

- Yes No W-2s provided by your employer(s)
- Yes No Social Security Benefits (Form SSA-1099)
- Yes No Interest and Dividend Income (Form 1099-Int and Form 1099-Div)
- Yes No Did you have an interest in or authority over a financial bank or investment account in a foreign country?
- Yes No Business Income reported on Form 1099-Misc
- Yes No Sale of Stocks, Bonds, or Crypto Currency, Other Investments (Please provide 1099-B or Alternate Sales Records)
- Yes No Did you make an Opportunity Zone Investment to defer capital gains?
- Yes No Real Estate Sales (Attach Settlement Statement) **(see Real Estate Tax Checklist)**



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Individual Tax Checklist - Continued

- Yes No IRA/Pension distributions / Rollovers / Transfers received (Form 1099-R)
- Yes No State and local tax refunds (Form 1099-G)
- Yes No Unemployment Income (Form 1099-G)
- Yes No Did you receive mortgage interest from an outstanding loan?
- Yes No Gambling winnings (Form W2-G/Form 1099); Prize money or in-kind?
- Yes No Paid Tuition Expenses (Form 1098-T)
- Yes No Student Loan Interest (Form 1098-E)
- Yes No Cancelled or Forgiven Debts (Form 1099-C) or Abandoned Property (Form 1099-A)
- Yes No Distribution from an Education Savings Account or Qualified Tuition Program (Form 1099-Q)

ESTIMATED INCOME TAX PAYMENTS

Yes No Did you make any estimated payments for 2018? If yes, please list the amount and date paid below.

	Amount	\$ _____	Date Paid	_____
	Amount	\$ _____	Date Paid	_____
	Amount	\$ _____	Date Paid	_____
	Amount	\$ _____	Date Paid	_____

ITEMIZED DEDUCTIONS (Please respond and attach documents.)

Yes	No	Medical expenses? (e.g. doctor visits, pharmacy, insurance, hospitalization, supplies)	\$	_____
Yes	No	Medical miles? How many miles did you drive to tend to medical/dental needs?		_____
Yes	No	Did you purchase a vehicle? If so, how much sales tax was paid?	\$	_____
Yes	No	Real estate taxes paid on primary residence/second home? Please list.	\$	_____
Yes	No	Did you register vehicles? Please list the amount you paid for each.	\$	_____
Yes	No	Mortgage interest and mortgage insurance paid (Form 1098)	\$	_____
Yes	No	Did you pay investment interest? If so, please list.	\$	_____
Yes	No	Did you refinance? If so, please provide a copy of your settlement statement.	\$	_____
Yes	No	Did you make any charitable <u>Cash/Check</u> donations? Please attach list and amounts.	\$	_____
Yes	No	Did you donate any in-kind (non-monetary) items to charity that totaled over \$500?	\$	_____
		Name and address of Charity: _____		
		Description of items _____	<i>Attach separate sheet if necessary</i>	
Yes	No	Charitable Miles? Please list the number of miles driven for charitable purposes.		_____
Yes	No	Were you a victim of a qualified disaster resulting in a casualty loss? Please describe your damages and the value of the items not paid for by insurance.	\$	_____
Yes	No	Income tax preparation fees? If yes, please list the amount paid.	\$	_____



Individual Tax Checklist - Continued

- Yes No Did you withdrawal from an IRA/pension before age 59 1/2? If so, please list the reason(s). \$ _____
- Yes No Safe deposit box fees to store income-producing stocks/bonds? Amount paid? \$ _____
- Yes No Did you pay Estate Tax? Please provide the amount paid. \$ _____
- Yes No Gambling losses? (Note: you may deduct gambling losses to the extent of winnings.) \$ _____

OTHER ITEMS

- Yes No Did you start a business or acquire interest in a partnership or S Corporation?
If yes, please complete the Business Tax Checklist
- Yes No Would you like to know if you qualify to receive the Qualifying Business Income Deduction under IRC Section 199a? **If yes, please schedule a time to discuss.**
- Yes No Did you purchase rental or royalty property? **(Please complete the Real Estate Tax Checklist.)**
- Yes No Did you purchase or sell your principal home, take a home equity loan, or acquire a second home?
If yes to either question, please attach your settlement statement or any other pertinent documents.
- Yes No Did you purchase an electric vehicle? If so, please attach the purchase documents.
- Yes No Did you install solar panels on your home and/or make other energy efficient improvements?
- Yes No Did you, your spouse, or dependents incur any tuition expenses that are required to attend a college, university, or vocational school? Please list item and expense amount below:
 - Computer /Laptop \$ _____
 - Books \$ _____
 - Supplies \$ _____
 - Tuition \$ _____
 - Other (Specify) \$ _____
 - \$ _____

RETIREMENT PLANNING

- Yes No Would you like information on how to grow your hard-earned money so that it is available, tax-free when you need it most?
- Yes No Do you have a tax effective exit plan for your IRAs?
- Yes No Are your beneficiary designations correct? When is the last time they were updated?
- Yes No If you have ever been divorced, did you update your retirement plan beneficiary designations?