

**Items Needed to Complete Your 2019 Tax Return**

Name \_\_\_\_\_

Address \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_

\_\_\_\_\_ All W-2's.

\_\_\_\_\_ Tax statement(s), Form 1099's, for Dividend(s).

\_\_\_\_\_ Tax statement(s), Form 1099's, for Interest.

\_\_\_\_\_ All 1099's for Retirement Account(s).

\_\_\_\_\_ All Cryptocurrency/Bitcoin activity.

\_\_\_\_\_ All student loan interest statements for interest paid during the year.

\_\_\_\_\_ Stock & investment yearly information, Form 1099 statement(s) & stock basis information

\_\_\_\_\_ Closing Statements for purchase & sale of residence.

\_\_\_\_\_ Mortgage interest statement(s), Form 1098.

\_\_\_\_\_ Property taxes paid on the residence.

\_\_\_\_\_ Form 1098-T for education credit for higher education.

\_\_\_\_\_ Rental income Property - Income & Expenses (see checklist).

\_\_\_\_\_ Self Employed - Income & Expenses (see checklist).

\_\_\_\_\_ Job related expenses - Dues, Uniforms, etc. (for PA & local returns)

\_\_\_\_\_ Home office expenses.

\_\_\_\_\_ Changes in Dependents.

\_\_\_\_\_ Last Paystub received from each job in 2019.

\_\_\_\_\_ Form 1095 A, if you have received a tax credit from the insurance market place.

\_\_\_\_\_ Form 1095 B or Form 1095 C (Proof of Health Coverage if applicable).

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\_\_\_\_\_



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**If you are unsure if the document(s) are needed for the preparation of your tax return, please include the document(s) with the information you drop off.**

**Rental**  
**Income & Expenses Checklist**

PROPERTY	KIND AND LOCATION	Acquired Mo - Yr	COST

**INCOME** **PROPERTY**

RENTS RECEIVED

OTHER INCOME

**EXPENSES**

ADVERTISING

AUTO AND TRAVEL - MILES

CLEANING AND MAINTENANCE

COMMISSIONS

INSURANCE

LEGAL & PROFESSIONAL

MORTGAGE INTEREST PAID TO BANKS ETC

OTHER INTEREST

- CARPENTRY
- FURNACE
- PAINTING
- PLUMBING

REPAIRS OTHER

LIST IMPROVEMENTS SUCH AS NEW ROOF *add'l comments*

SUPPLIES

TAXES

- ELECTRICITY
- FUEL

UTILITIES WATER/SEWER

YARD/SNOW REMOVAL

OTHER

WHAT % OF PROPERTY WAS RENTAL %

*additional comments*

**Self Employed**  
**Income & Expenses Checklist**

Total Sales

Inventory / Materials

Purchased

Inventory at  
12/31/2019

Shipping Fees

Postage

Education

Business Mileage

Total Mileage

Travel Expense

Meals

Telephone

Utilities

Internet Expense

Clients Gifts

Dues & Subscriptions

Tools

Equipment

Rent

Insurance

Legal & Professional Fees

Office Expense

Repairs

Supplies

License

Bank Fees

Subcontractors

Credit Card Fees

Intrest