

Items Needed to Complete Your 2018 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 student loan interest statements for interest paid during the year.

_____ Medical expenses paid in 2018.

_____ 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.

_____ 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 in 2018.

_____ 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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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
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RENTS RECEIVED	
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OTHER INCOME	
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EXPENSES

ADVERTISING	
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AUTO AND TRAVEL - MILES	
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CLEANING AND MAINTENANCE	
--------------------------	--

COMMISSIONS	
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INSURANCE	
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LEGAL & PROFESSIONAL	
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MORTGAGE INTEREST PAID TO BANKS ETC	
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OTHER INTEREST	
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CARPENTRY	
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FURNACE	
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PAINTING	
----------	--

PLUMBING	
----------	--

REPAIRS OTHER	
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LIST IMPROVEMENTS SUCH AS NEW ROOF	<i>add'l comments</i>
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SUPPLIES	
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TAXES	
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ELECTRICITY	
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FUEL	
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UTILITIES WATER/SEWER	
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YARD/SNOW REMOVAL	
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OTHER	
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WHAT % OF PROPERTY WAS RENTAL	%
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<i>additional comments</i>	
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**Self Employed
Income & Expenses Checklist**

Total Sales _____

Inventory / Materials _____

Purchased _____

Inventory at
12/31/2018 _____

Shipping Fees _____

Postage _____

Education _____

Business Mileage _____

Total Mileage _____

Entertainment _____

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 _____