

J&A INCOME TAX

ARE YOU MISSING OUT ON DEDUCTIONS?

2018 Tax Return Preparation Checklist

General Taxable Income

- ___ W-2 Form(s) for Wages, Salaries, and Tips
- ___ Interest Income Statements: Form 1099-INT & 1099-OID
- ___ Dividend Income Statements: Form 1099-DIV
- ___ Sales of Stock, Land, etc. for Capital Gains: Form 1099-B
- ___ Sales of Real Estate: Form 1099-S
- ___ State Tax Refunds: Form 1099-G
- ___ Alimony Received or Paid
- ___ Unemployment Compensation Received
- ___ Miscellaneous Income: Form 1099-MISC, Form W2-G Gambling, Etc...

Retirement Income

- ___ Retirement Income: Form 1099-R
- ___ Social Security Income and Railroad Retirement Income: Form SSA-1099

Business Income

- ___ Business Income and Expenses
- ___ Rental Income and Expenses
- ___ Farm Income and Expenses
- ___ Form K-1 Income from Partnerships, Trusts, and S-Corporations
- ___ Tax Deductible Miles Traveled for Business Purposes

Expenses and Tax Deductions

- ___ Medical Expenses for the Family
- ___ Medical Insurance Paid
- ___ Prescription Medicines and Drugs
- ___ Doctor and Dentist Payments
- ___ Hospital and Nurse Payments
- ___ Long Term Care Insurance
- ___ Tax Deductible Miles Traveled for Medical Purposes
- ___ Home Mortgage Interest from Form 1098
- ___ Home Second Mortgage Interest Paid
- ___ Real Estate Taxes Paid – Limited for 2018
- ___ State Taxes Paid with Last Year's Return – Limited for 2018
- ___ Personal Property Taxes Paid – Limited for 2018
- ___ Charitable Cash Contributions
- ___ Fair Market Value of Non-cash Contributions to Charities
- ___ Unreimbursed Expenses Related to Volunteer Work
- ___ Tax Deductible Mileage for Volunteer Purposes
- ___ Casualty and Theft Losses – Named Storms, Federal Disaster Area
- ___ Student Loan Interest Paid 1095-A, B and or C
- ___ Documents for proof of medical insurance
- ___ IRA Deductions

Tax Credits

- ___ Child Tax Credit
- ___ Child Care Provider Address, I.D. Number and Amounts Paid for the Child and Dependent Care Credit
- ___ Earned Income Tax Credit (EITC)
- ___ Adoption Expense Information for the Adoption Credit
- ___ Foreign Taxes paid
- ___ First Time Home Buyer Tax Credit – For Payback Purposes
- ___ Tuition Information For Tax Credits (1098-T)

Tax Estimate Payments

- ___ Estimated Tax Payments Made with ES Vouchers
- ___ Last Year's Tax Return Overpayment Applied to This Year

General Information

- ___ Copy of Last Year's Tax Return
- ___ Dates of Birth, Social Security Numbers for You and Your Spouse
- ___ Dependents' Names, Years of Birth, Social Security Numbers w/ documentation
- ___ Child Care Expenses for Each Dependent
- ___ Routing Transmit Number (RTN) (For direct deposit/debit purposes)
- ___ Bank Account Number (BAN) (For direct deposit/debit purposes)
- ___ Any IRS issued PINS relating to Identity Theft
- ___ Non taxable income sources for calculating state tax credits, child support, workers compensation, FIA Cash Benefits

\$50 OFF

***First time clients only, applies only to the preparation of both federal and state tax returns. Expires 4-15-19**