Tax Appointment Preparation Checklist 2019

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Personal Information

_____ Last year's tax return, ***if you are a new client***.

_____ Name, address, SSN and DOB for yourself, spouse, and dependents, ***if not on file with us***.

_____ Banking Information, ***if Direct Deposit Refund AND different from last year***.

_____ Proof of Health Insurance, 1099 HC or 1095A ***(Nothing Needed for Medicare)***

_____ Name, Address, Tax ID/SSN of Dependent Care Provider, ***if different from last year.***

Income Data (where applicable)

_____ Wages (W-2)

_____ Other Income (1099 MISC)

_____ Interest and/or Dividend Income (1099-INT/DIV)

_____ IRAs, Pensions & Annuities (1099-R)

_____ Social Security Benefit Statement (SSA-1099)

_____ State/Local Refund/Credit/Offset (1099-G)

_____ Alimony Received (& Agreement Date)

_____ Small Business Income (Schedule C)

_____ Stock or Bond Activity (1099-B)

_____ Convertible Virtual Currency Transactions (eg. Bitcoin, Ether, Roblox, V-bucks)

_____ Partnership/S-Corp/Trust Estate Income (K-1's)

_____ Lump Sum Retirement Distribution (1099-R)

_____ Rental Income

_____ Farm Income

_____ Unemployment (1099-G)

_____ Gambling/Lottery Wins & Losses/ Prizes (W-2G)

_____ Cancelled Debt (1099-C)

_____ Foreign Income

_____ All other income: Jury Duty, Barter, etc. . .

Expense Data (where applicable)

_____ Alimony Paid (& Agreement Date)

_____ Dependent Care Costs

_____ Solar Energy Equipment & Labor Costs

_____ Educator Expenses

_____ Student Loan Interest

_____ Tuition Costs/Books & Supplies (1098-T)

_____ HSA Contributions

_____ Home Sold/ Bought (Settlement Statement)

_____ Roth/Traditional IRA Contributions

_____ Estimated Tax Payments to Federal or State Government and Dates Paid

Schedule A Deductible Expenses

(Under the new laws, you probably can itemize ONLY if you have LARGE expenses in the following categories.)

_____ Medical/Dental Expenses

_____ State/Local Income Taxes or General Sales Taxes

_____ Real Estate Taxes

_____ MA Vehicle Excise Tax or NH Local Municipal Portion of Vehicle Registration Fee

_____ Paid Sales Tax on large purchase: vehicle/boat

_____ Mortgage/Home Equity Loan Interest (1098)

_____ Charitable Contributions Cash/Non-Cash

_____ Uninsured casualty and theft losses from federally declared disaster

Expense Data (unique to Massachusetts)

_____ 529 College Savings Plan Contributions

_____ MA rent Paid with Name & Address of Landlord

_____ MA Commuter Rail and/or Fast Pass Tolls

_____ **<u>If over 65 year of age</u>**, MA Primary Residence Water/Sewer Bills & Real Estate Tax Bills (The "Circuit Breaker" Credit.)