2019 Income Tax Document Checklist

Please provide us with the following documentation/information during your tax appointment or include them if mailing to the office.

The existence of any/all documents will depend on your particular tax situation.

<u>*NEW*</u>

1095-A
1095-B
1095-C

** These contain information regarding your health insurance premiums and will be provided to you by your health insurance company.

FORM	(X)	DESCRIPTION
W-2's	________	From all employers and copy of your last pay stub
W-2G	________	Gambling winnings
1099-INT	________	Interest income from banks, insurance companies, & financial institutions
1099-DIV	________	Dividend income from banks, corporations, and financial institutions
1099-B	________	Stock sales & hedging gains/losses
1099-C	________	Debt Cancellation
1099-K	________	Payment Card and Third Party Network Transactions
1098-E	________	Interest paid on college loans
1099-G	________	State tax refunds, unemployment, USDA, and other government payments
1099-MISC	________	Rent received, custom work, **crop insurance proceeds, prizes
1099-PATR	________	Patronage Dividends
1099-R	________	IRA, pension and annuity distributions
1099-S	________	Proceeds from Real Estate Transactions
1099-SSA	________	Social Security benefit statements
1098-T	________	College tuition statements
1098	________	Mortgage interest on a house, farmland or other property
K-1 Schedules	________	Partnerships, S-Corporations, LLC's, Estates and Trusts
1099-SA	________	HSA Distributions
Other:	________	Energy Credit Documentation
	________	Real Estate Tax Statements for taxes paid
	________	Closing Statement on Sale of Personal Residence
	________	Sales Tax paid on purchases of Autos, Boats, Planes & Motorcycles
	________	Contributions to SEP, IRA, SIMPLE Plans, and HSA's
	________	Birth date & Social Security card for any new dependents for year
	________	Daycare providers name, address, social security number and amount paid
	________	Dated invoices of all major purchases or sales (equipment & investments)
	________	Bill of Sale for assets purchased
________	________	E-mail addresses for communication purposes
________	________	Cell phone number, if available

** Please bring in **ALL** documents pertaining crop insurance proceeds

NOTE: We have worksheets in our office & published on our website to help you prepare for your upcoming appointment. Some of these include Farm, Self-Employed Business Operations, Itemized Deductions, Rental Income & Expenses, and Daycare & Home Office worksheets.