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2018 Income Tax Checklist

Forms	Yes ( )	No ( )
INCOME		
W-2 (Wages)		
1099-R (Pension, IRA, 401k, 403b, 457)		
1099-G - Unemployment; 2018 State, City Refunds if you Itemized in 2017		
1099 MISC Schedule C- Contract Worker (no tax withheld); Royalties		
Schedule E - Rental Property		
1099 B - Sale of Investments - Schedule D		
1099 DIV - Dividend Income		
1099 Int - Interest (Bank, Credit Union, Bonds, etc.)		
Social Security		
ADJUSTED INCOME		
F3903 Moving Expenses – Military ONLY		
IRA Deduction		
Student Loan Interest		
Educator Expense		
HSA, Self Employment Health Insurance (SEP)		
TAX & CREDITS		
Sch A-Itemized Deductions (medical, charity, mortgage interest, property taxes, license tag renewal, State/Local taxes paid for 2017)		
Child Tax Credit (children) Number of Children under age 17		
Other Dependents (children age 17 and up), others who qualify		
F-2441 Child & Dependent Care Expenses		
Earned Income Tax Credit (EITC)		
Health Care Coverage Proof *(Forms 1095-A, 1095-B, 1095-C)*		
ALL CLIENTS: Currently dated picture identification (D/L, State ID); Social Security Cards should be presented at appointment		
NEW Clients: Bring copy of 2017 tax returns to appointment		

This checklist covers the basics. Depending on your tax situation, you may receive additional tax forms (ex: K-1, 1099-Q, 1099-OID, 1099-C, etc.). Casualty losses can be claimed subject to declaration of a disaster. **Forms 1040A and 1040-EZ no longer exist.**