

ELE-Peagler LLC

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2019 Income Tax Checklist

Forms	Yes (√)	No (√)
<u>INCOME</u>		
W-2 (Wages)		
1099-R (Pension, IRA, 401k, 403b, 457)		
1099-G - Unemployment 1099-G - State and/or City Refunds if you itemized (Schedule A) in 2018		
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.)		
SSA 1099 - Social Security (see the color pink on the form)		
<u>ADJUSTED INCOME</u>		
F3903 Moving Expenses - employment change		
IRA Deduction		
1098-E Student Loan Interest		
½ Self Employment		
Educator Expense		
1099-SA or 5498-SA HSA, Self Employment Health Insurance		
<u>TAX & CREDITS</u>		
Sch A-Itemized Deductions (medical, charity, mortgage interest, property taxes, unreimbursed employee expenses; etc.		
Child Tax Credit (children)		
Additional Child Tax Credit		
Child & Dependent Care Expenses		
Other Dependents (age 17 & up)		
Earned Income Tax Credit (EITC)		
<u>ALL CLIENTS:</u> Currently dated picture identification (D/L, State ID); Social Security Cards should be presented at appointment		
<u>NEW</u> Clients: Bring copy of 2018 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, 1099-K, etc.). Casualty losses can be claimed subject to declaration of a disaster.

Referrals Welcomed