2019 INCOME TAX GUIDE
GENERAL INFORMATION

TAXPAYER ____________________ ____________________ ____________________
FIRST MIDDLE INITIAL LAST

SPOUSE ____________________ ____________________ ____________________
FIRST MIDDLE INITIAL LAST

ADDRESS ____
STREET ADDRESS OR P.O. BOX NUMBER

CITY____________________**STATE**______**ZIP CODE**__________**COUNTY**______________________

HOME/CELL PHONE__________________**BUSINESS PHONE**____________________

TAXPAYER SSN________________**TAXPAYER BIRTHDATE**____________________

SPOUSE SSN __________________**SPOUSE BIRTHDATE** ______________________

E-MAIL ADDRESS ____

DEPENDENTS:

- **IF INCOME IS MORE THAN $2,100.00 PER CHILD, PLEASE BRING CHILD'S 1099's & W2's**

NAME	DATE OF BIRTH	SOCIAL SECURITY NUMBER

E-FILING? YES / NO (CIRCLE ONE)

- **Note: We will e-file unless you tell us not to.**
- **Please provide us with the E-filing PIN if you received one from the IRS**

DIRECT DEPOSIT REFUND? YES / NO (CIRCLE ONE)

- **If yes we will need a cancelled check to get routing and account numbers**

FOREIGN BANK OR INVESTMENT ACCOUNTS:

- **If the value of these accounts exceeds $10,000 at any time during 2019 we need to report them. Failure to do so could result in substantial penalties.**

HEALTH INSURANCE COVERAGE:

- **Please provide all Forms 1095A, 1095B and 1095C that you received**
- **The penalty for not having health insurance does not apply for 2019 tax returns. However if you purchased insurance through the government exchange we will need to reconcile any advance premium credit that you received.**

CHECKLIST OF ITEMS NEEDED

INCOME:

1. W-2's & W-2G's (FOR GAMBLING WINNINGS)

2. 1099'S:
    - 1099-INT FOR INTEREST INCOME
    - 1099-DIV FOR DIVIDEND INCOME
    - 1099-B FOR STOCK SALES
    - 1099-MISC FOR SELF EMPLOYMENT INCOME
    - 1099-MISC FOR RENTAL INCOME
    - 1099-R FOR RETIREMENT INCOME AND ANNUITIES
    - 1099-G FOR STATE UNEMPLOYMENT
    - 1099-G FOR STATE REFUNDS
    - SSA-1099 FOR SOCIAL SECURITY OR DISABILITY BENEFITS
    - 1099-Q FOR DISTRIBUTIONS FROM 529 PLANS

3. SCHEDULE K-1'S:
    - PARTNERSHIPS
    - S-CORPORATIONs
    - TRUSTS AND FIDUCIARIES

4. ALL RECORDS DEALING WITH:
    - SELF-EMPLOYED BUSINESS INCOME AND EXPENSES
    - STOCK PURCHASES
    - SETTLEMENT STATEMENTS FOR REAL ESTATE PURCHASES & SALES
    - RENTAL INCOME AND EXPENSES
    - FARM INCOME AND EXPENSES
    - ALIMONY PAID OR RECEIVED
    - CONVERSIONS OF A TRADITIONAL IRA TO A ROTH IRA

DEDUCTIONS:

1. MEDICAL AND DENTAL EXPENSES
    - Please provide all Forms 1095A, 1095B and 1095C

2. REAL ESTATE TAXES

3. PERSONAL PROPERTY TAXES

4. FORM 1098 FOR MORTAGE INTEREST PAID

5. RECORDS OF INVESTMENT INTEREST PAID IN 2019

6. CHARITABLE CONTRIBUTIONS
    - No deduction is allowed for any contribution of cash, check or other monetary gift unless the donor can show a bank record or a written communication from the charity indicating the amount and date of contribution.
    - For any single donation of $250 or more, you must have a written acknowledgement from the charity.
    - For all non-cash donations (i.e. Goodwill) we will need an approximate fair market value of the contribution on the date contributed.

7. CASUALTY LOSSES

8. GAMBLING LOSSES
   - Please provide all records substantiating gambling losses
   - Note that gambling losses are only deductible to the extent of gambling winnings for taxpayers who can itemize.

9. DEPENDENT CARE EXPENSES (FOR YOUR CHILD UNDER AGE 13)
   - Include name of dependent and amount paid.
   - Please provide the care provider's name, address and social security number or federal ID number

10. AUTO MILEAGE LOG FOR ANY SELF-EMPLOYED BUSINESS OR RENTAL

11. FORM 1098-E FOR STUDENT LOAN INTEREST PAID

12. FORM 1098-T FOR ALL TUITION AND HIGHER EDUCATION EXPENSES

13. IRA CONTRIBUTIONS MADE IN 2019 (BOTH TRADITIONAL AND ROTH)
    - Please provide Form 5498

14. HEALTH SAVINGS ACCOUNTS:
    - Please provide Form 5498-SA to show HSA contributions
    - Please provide Form 1099-SA to show HSA distributions

15. 529 PLAN CONTRIBUTIONS
    - Please provide year-end statement showing total contribution for the year
    - 529 contributions are state-deductible only.

ESTIMATED TAXES PAID:

	DATE PAID	FEDERAL AMOUNT PAID	STATE AMOUNT PAID
FIRST QUARTER			
SECOND QUARTER			
THIRD QUARTER			
FOURTH QUARTER			

WE NOW ACCEPT VISA, MASTERCARD AND DISCOVER.

PLEASE CALL US AT 636-931-4100 TO MAKE AN APPOINTMENT WITH YOUR TAX PREPARER.