Tax Year 2018: Income Tax Organizer

Check off those that apply to you and be sure to bring the corresponding documentation and information to your tax preparation appointment.

QUICK REFERENCE

Be sure you have the following applicable information upon arriving to your tax preparation appointment:

[Personal Info- Name, Date of Birth, Social Security Number of you and anyone on your tax return]

[Income- **All**: W-2's, 1099's, K-1s] [Health Care- All: 1095 forms] [Credit & Deductions- All: 1098's, Form 5498]

GENERAL INFO

Personal Information

As a returning client most of your personal information is on file. Please be prepared to provide us with any changes in personal information such as: Name, Address, Phone #, etc. We will need the following additional info:

___ Bank Account Number and Routing Number (When possible, bring a voided check)

___ Additional/New Dependent Name, Social Security Number, Date of Birth (additional documentation may be necessary).

___ IRS Issued ID Theft Personal Identification Number (PIN) Letter (necessary for those who were issued a PIN by the IRS, usually due to ID theft or related issues).

___ Individual Tax Identification Number (ITIN) for those who do not have a Social Security Number

Medical Health Care Coverage Information

___ Form **1095-A** Health Insurance Market Place Statement (Covered CA. recipients) This form **is necessary** if you were a recipient of Affordable Care Act "Obama Care" coverage.

___ Form **1095-B** or **1095-A** (If insured thru work or directly with a health insurance company)

___ Form **1099-SA** Distributions form an Health Savings Account (HSA)

___ Proof of Health Insurance Coverage (medical card or health insurance statement). Not necessary for those who receive any of the above 1095 Form's

CREDITS AND DEDUCTIONS

Tax Credits and Deduction Checklist

___ Child Care Provider Address, I.D. Number and Amounts Paid

___ **Earned Income Tax Credit (EIC)**: Please provide a most current copy of one of the following documents: *School Records, Health Care Provider Statement, Medical Record, Certified Dependent Care Statement or Record, Social Service Records.* Please see the attached **FAQ** sheet for more information.

___ Form **1098-T** Tuition Statement**:** Education Credit (*provide us with details relating to all educational expenses*)

___ Form **1098-E** Student Loan Interest

___ Solar Panel Residential Energy Credit- Total amount spent on purchase and installation of solar panels

___ IRA Contributions Deduction: **Form 5498**

___ Qualified Plug-in Electric Drive Motor Vehicle Credit: Please provide- *Purchase date, year make & model, VIN*

For those who Itemize their deduction by meeting the qualified deduction expense threshold…

___ **1098** Mortgage Interest Statement

___ Real Estate Taxes Paid

___ Charitable Contributions (gifted items to charity and monetary donations)

___ DMV Registrations

___ Medical and Dental Expenses Paid

___ Gambling Losses

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INCOME

General Income

___ **W-2** Form(s) for Wages, Salaries, and Tips (*You need a W2 for each job worked in 2018*)
___ Form **1099-INT & 1099-OID** Interest Income Statements
___ Form **1099-DIV** Dividend Income Statements
___ Form **1099-B** Sales of Stock, Land, etc.
___ Form **1099-G** State Tax Refund (if you itemized
___ Form **1099-G** Unemployment Compensation Received from EDD *and/or* Taxable Paid Family Leave
___ Form **1099-MISC** Miscellaneous Income
___ Form **1099-C** Cancellation of Debt income
___ **W-2G** Certain Gambling Winnings
___ Form **1099-R** Retirement Income
___ Social Security and Railroad Retirement Income
___ Form **SSA-1099** Social Security benefits received

Other Income Requiring Special Processing and Additional Details

___ **Real Estate Rental Income and Expenses**

- Please provide us with an **END OF YEAR** statement that details and summarizes your income and expenses.
- Bring in any **1099-Misc** showing Rental Income received.
- Bring in all **1098-Forms** containing Mortgage Interest paid for each property.
- Bring info on real estate taxes and insurance payments.

___ **Form K-1** Income from Partnerships, Trusts, and S-Corporations
___ **Sale of Real Estate (Home or Rental Property)**

- Form **1099-S** Proceeds from a Real Estate Transaction
- Final Hud-1 Settlement Statement (for purchase and sale of property)
- Please provide us with dates of original purchase and sale of property

___ **Foreclosure, Short sale, Abandonment of Property Income**

- Please provide a Cancellation of Debt Form: **1099-C** and/or an Acquisition or Abandonment of a Secured Property Form: **1099-A**
- Final Hud-1 Settlement Statement (for purchase and sale of property)

Business: *Self-Employed, Sole-Proprietor, Partnership, LLC, S-Corp, C-Corp*

___ **Business Income and Expenses**:

❖ Please provide us with an **END OF YEAR Statement** such as a Profit and Loss, Income Statement, or similar report that summarizes your totaled annual income and expenses.

Additional charges for End of Year Bookkeeping may apply If calculating and categorizing is done by your tax preparer

___ **1099-Misc** forms containing reportable income received.
___ **1099-K** for credit card transaction payment you received through merchant services
___ Payroll W3 and 941 forms
___ Payments made to vendors and independent contractors
___ Documentation of business miles driven
___ Business Employee Identification Number (EIN) and State Entity Number
___ Articles of Incorporation (Corporations) OR Articles of Organization (LLC)
___ Business use of home information: Sqft of area used for business and sqft of total area of home
___ Asset Information for Calculation Depreciation: Purchase date, purchase amount, and date placed in service