

KLEINHENZ & COMPANY, LLP

TAX • ACCOUNTING • ADVISORY

www.kleinhenzcpa.com

TAX AND BUSINESS ACCOUNTANTS
FINANCIAL CONSULTANTS

Year 2019 TAX INFORMATION CHECKLIST

Be sure to bring, mail, email or drop off the following information if applicable:

- | | |
|---|---|
| <input type="checkbox"/> Forms 1095-A, B or C (Health Insurance Statement) | <input type="checkbox"/> Purchase or sale of residence (Settlement Sheets) |
| <input type="checkbox"/> Your Social Security number(s) and DOB ** | <input type="checkbox"/> Medical and dental expenses |
| <input type="checkbox"/> Dependents' Social Security number(s) and DOB** | <input type="checkbox"/> Real estate and personal property taxes |
| <input type="checkbox"/> W-2(s) | <input type="checkbox"/> State or local taxes paid |
| <input type="checkbox"/> Self-employment business income and expense summary | <input type="checkbox"/> PA Use Tax to be reported |
| <input type="checkbox"/> All 1099-MISC and/or 1099K Forms | <input type="checkbox"/> <u>Fed/PA/Local Estimated taxes paid</u> |
| <input type="checkbox"/> Commissions received/paid | <input type="checkbox"/> Charitable donations (<u>Receipts Required</u>) |
| <input type="checkbox"/> Pension, retirement income/1099-R | <input type="checkbox"/> Mortgage or home equity loan interest/1098-MTG
(New rules limit deductions to loans used to buy, build, or improve the principal residence) |
| <input type="checkbox"/> Unemployment income/1099-G | <input type="checkbox"/> Educator expenses |
| <input type="checkbox"/> Canceled Debt Amount/1099-C | <input type="checkbox"/> Tuition Paid/1098-T <u>Billing/Payment Detail Required</u> |
| <input type="checkbox"/> Social Security income/SSA-1099 | <input type="checkbox"/> Student loan interest/1098-E |
| <input type="checkbox"/> IRA contributions-Traditional or ROTH | <input type="checkbox"/> Child care expenses and provider information |
| <input type="checkbox"/> Statements on the sales of stocks or bonds/1099-B
(Cost basis info also required to calculate gain or loss) | <input type="checkbox"/> Copy of voided check for direct deposit of refund** |
| <input type="checkbox"/> Interest and dividend income/1099-INT/1099-DIV | <input type="checkbox"/> <u>Foreign Accounts Valued Over \$10,000.00</u>
<u>MUST BE REPORTED</u> |
| <input type="checkbox"/> Lottery or gambling winnings/losses/W-2G | <input type="checkbox"/> Any Questions You May Have Please Write On A Separate Sheet |
| <input type="checkbox"/> Partnership income/losses/Form K-1 | |
| <input type="checkbox"/> State refund amount/1099-G | |
| <input type="checkbox"/> Income and expense summary from rental property | |
| <input type="checkbox"/> Alimony paid or received(If divorced prior to 01/01/19) | |

** If Not Previously Provided

All Items May Not Apply

RECEIPTS MAY BE REQUESTED