

2018 Income Tax Checklist

Written by V K Bartley Bookkeeping and Tax Services

Sunday, 09 December 2018 21:23 - Last Updated Sunday, 09 December 2018 21:29

2018 Checklist for Preparing Your Income Tax Return

Use our checklist as a guide to help you gather documentation for preparing your income tax return.

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Driver's License or other Government Issued Picture Identification

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Copies of your 2015, 2016 and 2017 federal and state income tax returns

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Copies of Birth Certificates

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Taxpayers

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Children

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Parents

-

Other Dependents

-

-

Social Security numbers:

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Taxpayer

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Spouse

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Dependents

-

Child care provider

-

Alimony recipient

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Personal income:

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Employment income W-2 forms

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Unemployment income 1099-G forms

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Interest income 1099-INT & 1099-OID forms

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Dividend income 1099-DIV forms

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Brokerage transactions 1099-B forms

-

Distributions from medical savings accounts 1099-MSA forms

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Retirement plan distribution 1099-R forms

-

Social Security benefits FORM SSA-1099

-

Alimony received

-

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Gambling and lottery winnings W-2G forms

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Jury duty pay records

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State and local income tax refunds 1099-G forms

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FORMS 1099-C and 1099-A for cancellation of debts

-

Other miscellaneous income

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Dependents

-

Child care provider

-

Alimony recipient

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Self-employment income:

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Business income FORM 1099 K

-

Business income 1099-MISC forms or own records

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Partnership income K-1: 1065 forms

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S Corporation investment income K-1: 1120S forms

-

Rental property income 1099-MISC forms or own record

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Business-related expenses

-

Employment and business taxes paid

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Travel log

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Business checking account bank statements – January through December 2018

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FORM W-3 for wages paid to employees

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List of contractors name, address and social security numbers/federal employer identification number with amounts paid.

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Affordable Care Act documentation

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FORM 1095-A, Health Insurance Marketplace Statement

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FORM 1095-B, Employer Health Coverage Statement

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Evidence of insurance coverage for taxpayer and dependents – insurance card

-

Months you did not have insurance coverage

-

Homeowner information:

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Mortgage Interest 1098 forms

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Property sales proceeds 1099-S forms

-

Real estate taxes paid

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Rent paid

-

Moving expenses (military personnel only)

-

Homeowner insurance premium paid

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Personal expenses:

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Charitable donations

-

Alimony paid

-

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Adoption expenses

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Medical and dental expenses

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Child care expenses

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Expenses relating to employment or volunteer work

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Education tuition 1098-T form

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Student loan interest 1098-E form

-

Investment expenses

-

Expenses relating to job hunting or education

-

Wages paid to household employees

-

Retirement plan contributions

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Federal, state & local income tax paid for current year

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Records for any other expenses that may be deductible

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Charitable contribution

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List and values of items donated to tax exempt organizations

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Medical and dental expenses

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Other helpful information

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Copies of any adjustment notice of changes made to federal or state income tax returns for prior tax years.

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Your last pay stub for 2018.

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E-mail address