



CHECKLIST FOR NEXT YEAR'S TAX RETURN PREPARATION APPOINTMENT (2018 Tax Year)

Income Records		Income Records	
Alimony received		IRA distributions (Form 1099-R) and (Form 5498)	
Business income and expenses		Miscellaneous income (Form 1099-MISC)	
Dividends received (Form 1099-DIV)		Pension, annuity income (Form 1099-R)	
Farm income and expenses		Profit sharing, 401(k) distributions (Form 1099-R)	
Gain from sale of real estate (Form 1099-S, Settlement Statement)		Rents received and rental expenses	
Gain/Loss from sale of securities (Form 1099-B and trade confirmation from original purchase of securities)		Royalty income (Form 1099-MISC)	
Gambling winnings (Form W-2G)		Social Security and Railroad Retirement (Form SSA-1099, Form RRB-1099)	
Income from partnerships, estates, trusts or S corporations (Schedule K-1)		State/local income tax refunds (Form 1099-G)	
Installment sale income		Unemployment compensation (Form 1099-G)	
Interest received (Form 1099-INT)		Wages, salaries, commissions (Form W-2)	

Deductions for Adjusted Gross Income (AGI)		Deductions for Adjusted Gross Income (AGI)	
Alimony paid (Name and social security number of recipient) Pre 2019 Divorce decrees only		Moving expenses related to your job - Armed Forces on active duty ONLY	
Health insurance paid by a self-employed individual			
Health Savings Account (HSA) contributions		Penalties on early withdrawal of savings (CDs)	
IRA, Keogh, SEP and SIMPLE contributions		Student loan interest (limitations apply) (Form 1098-E)	

Itemized Deductions		Itemized Deductions	
Casualty losses (unreimbursed by insurance) in federally declared disaster areas only to the extent they exceed 10% of AGI		Medical and dental expenses (unreimbursed by insurance) to the extent they exceed 7.5% of AGI through 2018	
Charitable contributions		Points paid (Settlement Statement or Form 1098)	
Gambling losses (not in excess of gambling winnings)		Real estate taxes paid – subject to limitation	
Interest paid on home mortgages (Form 1098) – subject to limitation		State and local income taxes paid/Sales tax paid – subject to limitation	

Credits		Credits	
Adoption expenses (limitations apply)		Education credits (date(s) paid and amount(s) paid for tuition, Form 1098-T)	
Child and dependent care expenses (amount paid, name, address and social security number for each provider)		Foreign taxes paid (Form 1099-INT and/or Form 1099-DIV)	