INCOME TAX CHECKLIST

Taxpayer’s name SSN

Spouse’s name SSN

Taxpayer’s occupation Birthdate Blind?

Spouse’s occupation Birthdate Blind?

Address   
Phone

DEPENDENTS

Name SSN Birthdate Relationship

1)   
2)   
3)   
4)

Income Support by you Support by others Months in your home

1) $ $ $

2) $ $ $

3) $ $ $

4) $ $ $

NOTE: You must provide a social security number for all dependents.

PAPERWORK TO BRING

\_\_\_\_ W-2s \_\_\_\_ 1099-INTs \_\_\_\_ 1099-DIVs \_\_\_\_ Other 1099s

\_\_\_\_ K-1s \_\_\_\_ Tax forms with labels \_\_\_\_ Property tax bill \_\_\_\_ Last year’s tax return

\_\_\_\_ Health insurance coverage information

INCOME

INTEREST INCOME (if not on 1099-INT) DIVIDEND INCOME (if not on 1099-DIV)

T/S/J Payer Amount T/S/J Payer Amount

OTHER INCOME

Sales If you have other income, please bring all figures and

SALE OF STOCK OR OTHER PROPERTY Cost Price supporting data. Examples:

Please bring supporting documents (Form 1099-Bs and statements)

• If you have a business or rental property, please attach an   
 income/loss statement and supporting documents.

• If you borrow money and the debt is canceled or forgiven,   
 please include Form 1099-A and/or 1099-C.

Tips \_\_\_\_\_\_\_\_\_\_

Pensions / annuities \_\_\_\_\_\_\_\_\_\_

Jury duty \_\_\_\_\_\_\_\_\_\_

Unemployment (1099-G) \_\_\_\_\_\_\_\_\_\_

Alimony received\* \_\_\_\_\_\_\_\_\_\_

Prizes (1099-MISC) \_\_\_\_\_\_\_\_\_\_

Self-employment \_\_\_\_\_\_\_\_\_\_

Partnerships and S corporations \_\_\_\_\_\_\_\_\_\_

Estates & trusts \_\_\_\_\_\_\_\_\_\_

Social security benefits \_\_\_\_\_\_\_\_\_\_

Scholarships & fellowships \_\_\_\_\_\_\_\_\_\_

Tax refunds \_\_\_\_\_\_\_\_\_\_

Royalties \_\_\_\_\_\_\_\_\_\_

Nontaxable income \_\_\_\_\_\_\_\_\_\_

Gambling \_\_\_\_\_\_\_\_\_\_

Hobby Income \_\_\_\_\_\_\_\_\_\_

Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_

\* Not taxable for divorces commencing after 12/31/18

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DEDUCTIONS AND CREDIT ITEMS

RETIREMENT

Payments to a Traditional IRA

Taxpayer Date \_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_

Spouse Date \_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_ Payments to a Roth IRA

Taxpayer Date \_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_

Spouse Date \_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_

Penalty for early withdrawal \_\_\_\_\_\_\_\_\_\_

Alimony pd. (can’t deduct for divorces commencing after 12.31.18) \_\_\_\_\_\_\_\_\_\_   
Self-employed health insurance \_\_\_\_\_\_\_\_\_\_

Keogh, SEP & Simple contributions \_\_\_\_\_\_\_\_\_\_

MEDICAL EXPENSES

Medical Savings Account (MSA) contributions \_\_\_\_\_\_\_\_\_\_

Health Savings Account (HSA) contributions \_\_\_\_\_\_\_\_\_\_

Insurance & Medicare premiums \_\_\_\_\_\_\_\_\_\_

Prescriptions \_\_\_\_\_\_\_\_\_\_

Eyeglasses \_\_\_\_\_\_\_\_\_\_

Doctors \_\_\_\_\_\_\_\_\_\_

Dentists \_\_\_\_\_\_\_\_\_\_

Hospital \_\_\_\_\_\_\_\_\_\_

Ambulance \_\_\_\_\_\_\_\_\_\_

Medical auto mileage \_\_\_\_\_\_\_\_\_\_

Other medical travel expenses \_\_\_\_\_\_\_\_\_\_

Hearing aids & batteries \_\_\_\_\_\_\_\_\_\_

Other medical expenses \_\_\_\_\_\_\_\_\_\_

Reimbursements \_\_\_\_\_\_\_\_\_\_

CONTRIBUTIONS

Church \_\_\_\_\_\_\_\_\_\_

Other cash contributions \_\_\_\_\_\_\_\_\_\_

Charitable auto mileage \_\_\_\_\_\_\_\_\_\_ Property donated for which you have

receipts (fair market value) \_\_\_\_\_\_\_\_\_\_

Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_

CASUALTY & THEFT LOSSES

After 2017, the following expenses may only be claimed in a presidentially declared disaster area.

Cost of property lost \_\_\_\_\_\_\_\_\_\_

Fair market value of property \_\_\_\_\_\_\_\_\_\_

Insurance reimbursement received \_\_\_\_\_\_\_\_\_\_

JOB-RELATED MOVING EXPENSES

After 2017, only active military personnel may claim the following deductions.

Travel & lodging \_\_\_\_\_\_\_\_\_\_

Moving household goods \_\_\_\_\_\_\_\_\_\_

Total moving miles \_\_\_\_\_\_\_\_\_\_

BUSINESS AUTO EXPENSES

After 2017, employees may no longer claim the following deductions.

Total miles \_\_\_\_\_\_\_\_\_\_

Business miles \_\_\_\_\_\_\_\_\_\_

TAXES Gas & oil \_\_\_\_\_\_\_\_\_\_

Real estate tax \_\_\_\_\_\_\_\_\_\_ Interest \_\_\_\_\_\_\_\_\_\_

Personal property tax\* \_\_\_\_\_\_\_\_\_\_ Tolls & local transportation \_\_\_\_\_\_\_\_\_\_

City / county tax\* \_\_\_\_\_\_\_\_\_\_ Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_

Sales tax \_\_\_\_\_\_\_\_\_\_

Other\* \_\_\_\_\_\_\_\_\_\_ MISCELLANEOUS

Estimated Taxes State Federal Dues & subscriptions\* \_\_\_\_\_\_\_\_\_\_

Date pd. Education\* \_\_\_\_\_\_\_\_\_\_

Date pd. Safety equipment\* \_\_\_\_\_\_\_\_\_\_

Date pd. Uniforms\* \_\_\_\_\_\_\_\_\_\_

Date pd. Job seeking expenses\* \_\_\_\_\_\_\_\_\_\_

INTEREST EXPENSE Tax preparation\* \_\_\_\_\_\_\_\_\_\_

Home mortgage (1098) \_\_\_\_\_\_\_\_\_\_ Tools\* \_\_\_\_\_\_\_\_\_\_

Home mortgage - pd. to individuals \_\_\_\_\_\_\_\_\_\_ Business entertainment\* \_\_\_\_\_\_\_\_\_\_

(Include name and SSN of individuals) Investment & tax advice\* \_\_\_\_\_\_\_\_\_\_

Safe-deposit box\* \_\_\_\_\_\_\_\_\_\_

Hobby expenses\* \_\_\_\_\_\_\_\_\_\_

Investment interest\* \_\_\_\_\_\_\_\_\_\_ Gambling losses \_\_\_\_\_\_\_\_\_\_

Interest pd. on student loans (1098-E) \_\_\_\_\_\_\_\_\_\_ Other \*\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_

CHILD CARE EXPENSES - Bring list of monthly totals

Provider’s name Address ID# of provider(s) Amount pd.

EDUCATION CREDITS (1098-T)

Name of institution Tuition pd. Who attended When classes began

LOANS: If you borrowed money during the year, bring a list showing the amounts, dates and use of proceeds.

\* After 2017, taxpayers may no longer claim these deductions.