Tax Checklist

PERSONAL TAX RETURN Checklist – <u>This must be filled out, signed and returned with your tax information for us to prepare your return.</u> Thank you! **This list is **not** inclusive and some items may not apply. It is a guide to assist you in gathering your information for our office to prepare your personal tax return for the year. Backup documentation for all deductions will be required in the event of an audit.*

Yes	No	
		Any changes to your personal or contact info? Please fill out Personal Information Worksheet if any changes.
		Do you have any Foreign Financial Accounts? (Bank, Brokerage, Life Ins., Annuity, etc.…)
		Would you like to make a tax-deductible donation to MN Non-Game Wildlife Fund? $___________
		Did you receive, sell, send, exchange, or acquire any financial interest in any virtual currency?
		W-2's – Provide your W2's
		Did you receive **a 1099-K? Please provide this to us**
		Did you make internet purchases that didn't charge sales tax? If so, provide the dollar amount of purchases
		Are you Self Employed? **Please complete Schedule C Worksheet** located, on www.srfaustcpa.co
		Interest and/or Dividend Income – Provide Form ***1099-INT*** and/or *Form* ***1099-DIV***
		Stock/Mutual Funds sales transactions provide Form **1099-B**
		Pension/Annuity/IRA withdrawal/rollover – *Provide Form* ***1099-R***
		Alimony received or paid – Provide alimony paid or received on divorces that were final before Dec 31st 2018
		Social Security received – Provide *Form* ***1099-SSA***
		Unemployment received – Provide Form ***1099-G***
		Provide K-l's from Partnerships, S Corporations, Trusts, Estates
		Teachers – Please provide out of pocket expenses for materials used in the classroom
		HSA Contributions - Provide out of pocket contributions made to your HSA, **not through your employer**
		HSA Distributions - Provide *Form* ***1099-SA***
		Student Loan Interest – Provide Form 1098-E and **Please complete the Student Loan Worksheet** located, on www.srfaustcpa.co
		Real estate – Provide property tax statement and if you rent provide **Form CRP (certificate of rent paid)**
		License tabs for vehicles
		Mortgage interest statements – Provide *Form* ***1098*** (principal residence and/or 2nd home)
		New Car Loan – Provide interest paid statement and VIN
		Did you buy, sell, or refinance a home? Please **Provide Closing Statements**
		Charitable Contributions – Please complete **Charitable Contribution Worksheet** at www.srfaustcpa.co
		Did you get your Health Insurance through an exchange? If so, **Provide 1095-A**
		Long Term Care Insurance Policy – Provide Ins. Co., Policy number, Insured, and amount of premium
		If you made estimated tax payments provide date and amounts paid to Federal and State
		Post-Secondary Education - Provide Tuition Statement *Form* ***l098-T***
		Daycare provider information (Name, Federal ID #, address) and amount paid **per** child
		IRA contributions – Provide out of pocket contribution to a Traditional / Roth IRA **Not Through Your Employer**
		State of Minnesota K-12 school expenses - **Please complete K-12 School Worksheet** at www.srfaustcpa.co
		Did you **contribute** to or take a **distribution** from a 529 College Education Saving Account? Please provide the 1098-Q and **complete the 529 Worksheet** at www.srfaustcpa.co

TAXPAYER SIGNATURE **DATE**

SPOUSE SIGNATURE **DATE**

Please go to www.srfaustcpa.co and click on Individual Tax Center for above referenced worksheets.