

## Items Needed to complete your return

**Please bring all that apply to you**

### **NEW clients bring:**

1. Copy of prior year tax return
2. Picture ID & Social Security Cards
3. Birthdates for everyone on tax return

### **Income Information**

- ◆ W2(s) Employment Income
- ◆ 1099-G(s) Unemployment Received
- ◆ 1099-NEC(s) Non Employee Compensation Income
- ◆ W2-G(s) Gambling Winnings and losses per win
- ◆ 1099-R(s) Retirement/IRA Distributions
- ◆ 1099-SSA(s) Social Security Received
- ◆ 1099-INT(s) Interest Income
- ◆ 1099-DIV(s) Dividends Income
- ◆ 1099-B(s) Sale of property/investments
- ◆ Farm income and expenses
- ◆ Form K-1(s) Partnerships, Trusts, S-Corps
- ◆ 1099-MISC(s) Miscellaneous Income
- ◆ Any additional income not listed

### **Sch A-Itemized Deductions (if Qualify)**

- ◆ Property (Real Estate) Taxes paid
- ◆ 1098(s) Mortgage Interest paid
- ◆ Premium Mortgage Insurance (PMI)
- ◆ Excise tax paid on vehicle plates
- ◆ Out of pocket medical expenses (excess of HSA used)
- ◆ Medical mileage
- ◆ Donations made to charitable organizations
- ◆ Charitable mileage

### **Other items, Deductions & Credits**

- ◆ Form 8332 to Claim any Non Custodial Dependent
- ◆ Estimated tax payments (Dates & amounts made)
- ◆ Rent Paid including Landlord's Name and Address
- ◆ Educator Expenses Out of Pocket
- ◆ 1098-E Student Loan Interest paid
- ◆ Indiana College Choice 529
  - ➡ Contributions \$ and account #'s
- ◆ Child Care expenses paid
  - ➡ Provider name, address
  - ➡ identification #, amount paid per dependent
- ◆ 1098-T College Education expenses paid
- ◆ Private School costs for dependents
- ◆ Energy Efficient Home Improvements
- ◆ Electric Vehicle Purchases
- ◆ 1095-A (Marketplace insurance **if applicable**)
- ◆ 1099-SA(s) Health Savings Account Distributions
- ◆ Bank Information for direct deposit / balance due
  - ➡ Bank Routing & Account #'s

## Schedule C Worksheet

### Self Employed

### Businesses / or Contractors

- ◆ Business Name and Address (if any)
- ◆ Federal ID # (if any)
- ◆ Gross Business Income
- ◆ Office in Home?
  - ➡ Total square foot of home and office
  - ➡ Utilities paid on home except water
  - ➡ Homeowners Insurance paid

### Retail Businesses:

- ◆ Material and Supplies Purchased
- ◆ Beginning and Ending Inventory
- ◆ Merchandise Purchased for Resale

### Business Expenses:

- ◆ Advertising
- ◆ Materials and Supplies Purchased
- ◆ Business Mileage
  - ➡ Travel Log Totals-Per Vehicle
  - ➡ **OR** Vehicle expenses(actual expenses)
- ◆ Contract Labor / 1099's issued
- ◆ Equipment Rental Expenses
- ◆ Gross Payroll Wages & employer taxes paid
- ◆ Travel Expenses
- ◆ Travel Meals (while away overnight)
- ◆ Mortgage Interest, Real Estate Taxes, Insurance
- ◆ Rent and Utilities Paid on Business Property
- ◆ Repairs and Maintenance (non-vehicle)
- ◆ Office Expenses
- ◆ Tools and Uniforms
- ◆ Legal and Professional Fees
- ◆ Insurance
  - ➡ Liability & Workman's Comp
  - ➡ Self-Employed Health Insurance Paid

### Schedule E Worksheet for Each Rental Property

- ➡ Rental Property Address
- ➡ Cost or Value & Date Placed in Service
- ◆ Rents Received
- ◆ Advertising Costs
- ◆ Cleaning and Maintenance
- ◆ Improvements that increase rental value
- ◆ Property Taxes & Mortgage Interest
- ◆ Legal and Professional Fees
- ◆ Management Fees
- ◆ Rental Related Mileage
- ◆ Repairs and Supplies
- ◆ Utilities you paid on Rental
- ◆ Insurance (other than health)

**IRS Requires Income Tax Preparers to have proof of amounts provided to them "before" preparing a business form. Be prepared to provide a written or printed document containing all business totals to the preparer. Check out our website for helpful worksheets. [kristeltax.com](http://kristeltax.com)**