

# New Client Checklist 2019

Name \_\_\_\_\_

Printed **COPY OF LAST YEAR'S TAX RETURNS** (3 years if possible), social security numbers and dates of birth for everyone on the tax return.

Did your family have **Health Insurance** all year? Bring **Form 1095-A** if through **Healthcare.gov**.

**NEW:** We must have a copy of the **Driver's License** of husband and wife to enter on tax return. **Home equity loan interest not deductible unless spent on house.** Mortgage interest not deductible on the portion of loans over \$750,000. Employee business expenses eliminated.

**Estimated payments** (both federal and state, including **amounts** and **dates paid**).

Forms **W-2 and 1099-R, Social Security, IRA or 401(k)** distributions, other retirement income, Unemployment Compensation, HSA contributions/deductions, gambling income and losses.

Forms **1099** (interest, dividends, stock sales, miscellaneous income, cancellation of debt).

**All self-employment income and expenses**, equipment bought or sold, with dollar amounts and dates. Business miles and total miles on vehicle for the year.

**All other income: cash work, foreign income, alimony** (maintenance), **bartering**, etc.

Property tax, mortgage interest, home equity interest (not deductible unless spent on house), points, and **closing statements** from **home sale, purchase or refinance**.

**SALE OF INVESTMENTS**, including **COST, proceeds, and dates of transactions** (if you receive a **1099-B**, you have a sale). Please ask your broker for cost basis.

Tuition, books, fees from kindergarten to college - **MUST BRING 1098-T**; student loan interest.

Totals for medical expenses, including **health insurance premiums** you paid (not pre-tax), and long term care premiums (must exceed 7.5% of adjusted gross income to deduct).

Totals for charitable contributions, cash and non-cash, if itemizing deductions. You must have a proper, **written letter** from the charity if a **single donation of \$250** or more. Please bring **receipts for non-cash donations** and their value for Amvets, Goodwill, etc.

Child care expenses (includes pre-school & day camp) and **provider's SS # or EIN** and address.

IRA, Roth, IL Section 529 Plans, or Illinois college plan contributions, distributions, or rollovers.

Sales tax paid on any large purchases. **Office-in-home** expenses (not W-2 employees).

If you want **direct deposit** of your refund, please provide the following information with your tax package: name of bank, routing number, account number, and whether it is a checking or savings account (**a copy of a check is preferred**). Otherwise, it defaults to a check in the mail.

**If your spouse is not present** at the tax appointment, we need a **signed Power of Attorney** for one spouse to sign for the other. This also applies for a parent to sign for a non-minor child.

Other issues: **Financial assets outside USA of \$10,000** or more; anyone you support (possible dependents); **Senior Exemption or Freeze**; other questions or relevant items. It is a good idea to bring your check register from the prior year to the appointment to look up amounts.