

# Information Needed For 2019 Tax Return

- Copies of Drivers Licenses or Photo ID Cards (for new clients only). Originals or copies of social security cards and dates of birth for taxpayer, spouse and dependents (new clients & new dependents only).
- Prior year returns - at least 1 year (new clients only)
- W-2 & 1099 forms (wages, unemployment compensation, interest, dividends, etc.)
- Pension, Annuity, Social Security & IRA Information:
  - ◇ 1099 forms (1099-R for Pensions; SSA-1099 for Social Security; RRB -1099 for Railroad retirement income)
  - ◇ IRA contributions and conversions (Traditional and/or Roth)
  - ◇ Keogh, SEP or SIMPLE contributions
- Capital Gain Information:
  - ◇ 1099-B forms for sale of securities through a brokerage
  - ◇ Basis and date of purchase for securities on 1099-B forms
  - ◇ Relevant documentation for any other property sold
- Homeowner Information:
  - ◇ Closing statement for home sold during 2019
  - ◇ 1099-S form (proceeds from sale of house)
  - ◇ Closing statement for home purchased during 2019
  - ◇ Refinancing statements, if any
  - ◇ 1098 forms from banks, mortgage companies, etc. (interest paid on mortgage)
  - ◇ Real Estate taxes paid.
- Other Income Information:
  - ◇ Royalty, Partnership, Trust or S-Corp. income (K-1 forms)
  - ◇ W-2G for gambling winnings; related losses
  - ◇ State & local income tax refunds (1099-G forms)
  - ◇ Alimony received along with social security number and name of payer
  - ◇ Unemployment income forms (1099-G)
- Business Income & Expenses:
  - ◇ 1099-MISC Forms
  - ◇ Advertising
  - ◇ Cell phone, telephone, internet
  - ◇ Computers, fax machines, printers, copiers
  - ◇ Contract labor
  - ◇ Insurance: liability & professional premiums
  - ◇ Meals
  - ◇ Mileage (total miles driven and business miles number or % related to business)
  - ◇ Office supplies
  - ◇ Professional fees
  - ◇ Rent or in-home office expenses (see deduction information below for details)
  - ◇ Repairs & maintenance
  - ◇ Trade show costs
  - ◇ Travel, tolls, lodging, parking
  - ◇ Other direct operating expenses

- Rental income & expenses:
  - ◇ Rent collected
  - ◇ Advertising
  - ◇ Travel & mileage to inspect/maintain property
  - ◇ Commissions, management fees
  - ◇ Insurance
  - ◇ Association dues
  - ◇ Mortgage interest
  - ◇ Repairs
  - ◇ Pest Control, lawn care, pool maintenance
  - ◇ Supplies
  - ◇ Property taxes, tangible taxes, local licensing fees
  - ◇ Utilities
  - ◇ Appliances & other major asset purchases
  
- Dependent information:
  - ◇ Name, date of birth, social security number (original or copy of social security card for new dependents)
  - ◇ Names, Tax ID's, and addresses of dependent care providers, amounts paid for each dependent
  - ◇ Income of dependents, if substantial
  - ◇ Documentation relevant to custody of children of divorced parents
  - ◇ Proof that children lived with you (medical or school record showing child's name and your address)
  - ◇ Form 1098-T for anyone attending college plus amounts paid for books, computers & fees
  
- Deduction & other tax information:
  - ◇ Major medical expenses, health insurance and LTC (nursing home insurance)
    - Health Insurance Marketplace Statement (form 1095-A)
    - Health Coverage (form 1095-B)
    - Employer-Provided Health Insurance Offer and Coverage (1095-C)
  - ◇ Alimony paid along with social security number and name of payee
  - ◇ Margin interest
  - ◇ Casualty losses, including insurance settlement information
  - ◇ State and local taxes
  - ◇ Real estate taxes paid
  - ◇ Sales tax paid for major home improvements
  - ◇ Purchase agreement for new vehicle, boat or RV
  - ◇ Charitable contributions
  - ◇ Student loan interest paid (form 1098-E)
  - ◇ Tuition, books & fees for any family member attending college (form 1098-T)
    - Has any credit been taken before? For how many years?
  - ◇ Purchase receipts related to certain solar power systems (eligible for energy – related credits)
  - ◇ In home office deduction
    - Total sq ft of house, total sq ft of room(s) used for office
    - Rent amount if not owned by the taxpayer
    - Purchase price and date of purchase
    - Mortgage interest & property taxes
    - Home owner's insurance & HOA fees if any
    - Furnishings, equipment, wall hangings, carpet
    - Utility bills: electricity, telephone, water, gas, cable, trash, internet
    - Repairs & maintenance such as pest control, lawn care
  
- Amounts and dates of estimated payments paid to IRS for the year
- Any payments to IRS for prior years or as a result of audit resolutions
- Voided check, if direct deposit of your refund is desired

Peck Jenkins Kershner CPAs PA's 2019 Questionnaire – Ask us or follow this link to the questionnaire on our website:  
<http://www.pjkcpa.com/forms>