Two Hills Certified Public Accountants
Innovation | Growth | Excellence

Tax Preparation Checklist

Checklist of Information Needed to Complete Your Tax Return

If any item listed applies to you, check the box and attach the information

General Information

☐ If you are a new client or have had a change of address, email, or phone number, please complete the demographic information on page 3 of this checklist and provide a full copy of your 2018 federal/state tax returns.

☐ Did you have a child or other dependent that should be added to your return in 2019? If so, please complete the demographic information on page 3 of this checklist.

☐ Provide a copy of the front of a valid driver license for yourself and your spouse (we are required to input this information before e-filing your tax return as an additional security measure)

Income Information

- ☐ Wages (Form W-2)
- ☐ Interest Income (Form 1099-INT)
- ☐ Foreign bank accounts, income +/or paid taxes
- ☐ Dividend Income (Form 1099-DIV)
- ☐ Crypto/Virtual Currency buy/sell/trade
- ☐ Pension Distributions (Form 1099-R)
- ☐ State / Local Refunds (Form 1099-G)
- ☐ Gambling Income (Form W-2G)
- ☐ Stock Sale Information/Capital Gains (Form 1099-B)
  - ☐ Each stock sale: If not included on 1099-B, Date purchased, number of shares bought, amount paid
- ☐ Other Income
  - ☐ Alimony Received[1]
  - ☐ Unemployment Compensation (Form 1099-G)
  - ☐ Social Security Benefits (1099-SSA)
  - ☐ Disability Income
  - ☐ Jury Duty
  - ☐ Tip Income
  - ☐ Scholarships (Form 1098-T)
  - ☐ Education Savings Account Withdrawal (Form 1099-Q)
  - ☐ Bartering Income (Form 1099-B)
- ☐ Small Business (self-employed or independent contractor business owner)
  - ☐ Business Income (Form 1099-MISC plus items not on 1099-MISC)
  - ☐ Business Expenses (Provide list) (We will discuss possible deductions and accounting for them)
  - ☐ Vehicle Information (Year/Make/Model, business miles driven, total miles driven)
- ☐ Rental Property
  - ☐ Rental Income (Form 1099-MISC)
  - ☐ Related Expenses (Provide list)
- ☐ Schedules K-1 from Partnerships, S Corps, Trusts

---

[1] Specify if divorce decree was entered after 12/31/18.

Income Information (Continued)

- ☐ Sale of Real Estate
  - ☐ Closing Statement – Sale of Property
  - ☐ Closing Statement – Purchase of Property
  - ☐ List of additions/improvements while you owned the property.

Deduction Information

- ☐ IRA Contributions
- ☐ SEP, Simple, Keogh Plan Contributions
- ☐ Solo 401K Contributions
- ☐ Student Loan Interest (Form 1098-E)
- ☐ Alimony Paid[2]
  - ☐ Recipient Name and SS #
- ☐ Medical Expenses (if over 7.5% of income)
  - ☐ Medical mileage
  - ☐ Out of Pocket Medical Expenses
- ☐ Real Estate Taxes
- ☐ Other Taxes (including Sales tax paid on the purchase of autos, boats and RVs for personal use)
- ☐ Annual Vehicle Registration Statement (front and back) showing personal property taxes paid
- ☐ Mortgage Interest (Form 1098)
- ☐ Investment Interest
- ☐ Cash and Noncash Charitable Contributions (provide list with name of charity/organization and amount. If in-kind contribution, briefly describe items)

Tax Credits and Payment Information:

- ☐ Child Care Expenses
  - ☐ Provide name, address, SS# or EIN, and amount paid for each child
- ☐ Estimated tax payments (provide documentary proof of each payment made)[3]
- ☐ Legal papers for adoption, divorce or separation involving custody of your dependent children
- ☐ Tuition Statements (Form 1098-T) & Education Expenses
- ☐ Solar energy or vehicle tax credit information

Sales & Use Tax

Total goods purchased for which state sales tax was not paid: ______________________________

Direct Deposit or Refund Information:

☐ Bank Name: ______________________________

☐ Checking ☐ Savings Routing____________________ Account______________________________

[2] Specify if divorce decree was entered after 12/31/18.

[3] If you are unable to provide cancelled check images or online confirmation receipt, you can download your 2018 Account Transcript for free from the IRS online: https://www.irs.gov/individuals/get-transcript

New Clients

	Taxpayer	Spouse
Name		
Date of Birth		
Address		
Phone Number		
Email Address		

Children/Dependents:

Name	Does the Child have Income over $2,100	Date of Birth	Social Security Number