

INCOME TAX CHECKLIST

Please fill out the following if any changes from last year.

Taxpayer's Name _____

Taxpayer's Email _____

Taxpayer's occupation _____

Taxpayer's cell phone _____

Spouse's Name _____

Spouse's Email _____

Spouse's occupation _____

Spouse cell phone _____

Address _____

DEPENDENTS TO ADD - Provide social security cards

Name	Birthdate	Relationship	Months in Home	Did you provide all support*
1)				
2)				
3)				

*Income reported to us will need to show ability to support dependent being claimed.

PAPERWORK TO PROVIDE

_____ W2s	_____ 1099Gs	_____ 1099-INTs	_____ 1099Misc	_____ 1099Rs
_____ K1s	_____ 1099Bs	_____ 1099-DIVs	_____ 1099SSA	_____ 1095As

Let us know if you have received any of the following:

- *Did you receive the Frontline worker payment?
-Amount would have been \$487.45
- *Alimony
- *Annuities
- *Gambling Winnings
- *Jury Duty
- *Pensions
- *Prizes received
- *Rental income
- *Sale of real estate
- *Sale of stock
- *Self-employment
- *Tips
- *Unemployment

Non-taxable Income we need to know about

- *Government/county benefits
- *Scholarships and Grants
- *VA Benefits
- *Work Comp
- *Cancelled debt
- *Disability benefits
- *Employer pd education benefits
- *Foster care payments
- *Personal injury settlements

DEDUCTIONS AND CREDIT ITEMS

RETIREMENT

Payments to a traditional IRA
 Payments to a ROTH IRA
 Alimony Paid (can't deduct for
 divorces commencing after 12.31.2018)
 Self-employed health insurance

MEDICAL EXPENSES

*Health Savings Account (HSA) Contributions
 *Insurance and Medicare premiums (not pretax)
 *Prescriptions
 *Eyeglasses
 *Doctors
 *Dentists
 *Hospital
 *Ambulance
 *Medical auto mileage
 *Other medical travel expenses
 *Hearing aids and batteries
 *Other medical expenses
 *Reimbursements

TAXES PAID

Real estate Tax Paid
 Car Tabs

INTEREST EXPENSE

*Home Mortgage (1098)
 *Int pd on student loans (1098E)

CONTRIBUTIONS

*Church
 *Other cash contributions
 *Charitable auto mileage
 *Property donated for which you
 have receipts, with dollar
 value listed

MINNESOTA REVENUE

K-12 Education expenses
 *Required school supplies
 *Tuition
 *Instrument purchase or rental
 *Computer expenses
 *Tutoring
 *Music Lessons
 Long-Term Care Premiums
 Required work expenses
 Student Loan Credit
 *amount paid towards student loan
 last year
 *How much were your
 student loans?

Estimated Taxes Paid	Paid to Federal	Paid to State	
Date pd			

CHILD CARE EXPENSE INFO NEEDED

*Provider name
 *Provider address
 *Provider ID number
 *Amount paid during tax year

EDUCATION CREDITS

*Form 1098-T
 *Statement of account

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