KENYON & Associates

2019 Quick Checklist

This tax organizer is provided to clients as a guideline for gathering necessary information for the preparation of your 2019 tax returns. This sheet is a ***Quick Checklist***

Required Source Documents

- ❑ **W-2's** (From Paycheck Wages or Salary)
- ❑ **1099R's** (Pensions, IRAs, Rollovers, etc.)
- ❑ **1099-INT** (Interest Income Received)
- ❑ **1099-DIV, 1099-B** (Dividend Income)
- ❑ **1099-G** (State Refund/Benefits Postcard)
- ❑ **SSA 1099** (Social Security Benefits)
- ❑ **K-1 FORMS** (Partnerships, Trusts, etc.)
- ❑ **W-2G** (Gambling Winnings; ***Losses Log***)
- ❑ **1099-Misc** (Ind. Contractor)/ **1099 K** (CC Sales)
- ❑ **Alimony Received**
- ❑ **Profit & Loss Statement from Business**
- ❑ **Cancellation of Debt (1099-C and/or 1099-A)**
- ❑ **1095-A** Health Insurance Marketplace Stmt
- ❑ **1099-S** (Real Estate Sale & Closing Stmt)
- ❑ **1095-B** Health Coverage (Employment Stmt)
- ❑ **Stock Sales Transaction History**

Deductions

- ❑ **Retirement Plan Contributions** (IRA, Roth)
- ❑ **Cash Donations** (With Receipts, Records)
- ❑ **1098-E** (Student Loan Interest)
- ❑ **Non-Cash Donations** (See 4 Pg Guide)
- ❑ **1098-T** (Tuition & Educational Expenses)
- ❑ **Union & Professional Dues**
- ❑ **Alimony Paid** (Please Supply Facts)
- ❑ **Tax Return Preparation Fee & Mileage**
- ❑ **Medical & Dental (**Expenses, Premiums, Etc.)
- ❑ **Employee Job Related Expenses**
- ❑ **Taxes Paid** (State Income Tax, Local Property)
- ❑ **Educator Expenses** (Grades K to 12)
- ❑ **Personal Prop. Tax** (DMV, Boat, Motor Home)
- ❑ **Investment Expenses**
- ❑ **1098** (Home Mortgage Interest & Points)
- ❑ **Job Related Moving Expenses**
- ❑ **Job Seeking Costs**
- ❑ **Licenses, Fees, Credentials, Etc.**
- ❑ **Self-Employed Health Insurance**
- ❑ **Rental of Property** (House, Condo, etc.)
- ❑ **Self-Employed Retirement (**SEP, SIMPLE)
- ❑ **Early Withdrawal Penalty** (Savings)

Other Common Deductions

- ❑ **Dependent Care** (Provider & Expenses Info)
- ❑ **Capital Gains & Losses** (Stocks, Bonds, Etc.)
- ❑ **Education Credits** (Student Expenses)
- ❑ **Escrow Settlement/Closing Statements**

Other Common Matters

- ❑ **Direct Deposit Bank Information** (Refund)
- ❑ **2018 Estimated Taxes Paid Information**

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