

Killingbeck Tax Service

What to bring - Checklist

WHAT TO BRING:

- Driver's licenses for IRS identity verification.
- SS card for dependents not claimed before
- Proof of expenses and residence for HoH, new clients
- W-2s from all Jobs, Sickpay and Subpay
- 1099s on: Pensions, IRAs, Social Security, HSA, Unemployment, Savings Interest & Bonds Cashed
- 1099s for Dividends on Stock and Stock Sales, Cancelled Debt, Foreclosures and Condemnations
- 1095A if you had insurance through Obamacare
- 1095B or 1095C on your health insurance
- Other income: Jury Duty, Lottery, Gambling
- Rental or business income and expenses
- Property tax paid for your home
- For renters: rent paid, landlord's name & address
- 1098-T for College Tuition, also amounts paid for books & expenses
- Student loan interest
- Day Care receipt & information
- K-12 Private or home school expenses
- Estimated tax payments to IRS or State
- Contribution to 529 College Choice

Itemization is beneficial if it exceeds the Standard Deduction of:

\$12,000 Single and MFS, \$18,000 Head of Household, \$24,000 Married Filing Joint

Medical bills must exceed 7.5% of your AGI

Prescriptions, Insulin, Prescribed foods _____

Insurance: Medicare, Supplements, Long Term Care _____

Doctors, Dentists, Chiropractor, Hospital, Eye Doctor _____

Nurse, Nursing Home or Long Term Care Costs _____

Therapy, Wheelchair _____

Hearing Aids, Eyeglasses, Equipment, _____

Auto Mileage, Travel Expenses, Other Costs _____

Home Interest

1st Mortgage, Purchase Points _____

2nd Mortgage, Home Equity Loan _____

2nd Home or a RV or Boat Used as a 2nd Home _____

Taxes Paid (limit of \$10,000)

Home, Other Property, _____

Vehicles: Excise Tax / Wheel/Sur _____/_____

Boat, Trailer, RV, Personal Property Tax _____

Amount You Owed the State Last Year _____

State, County & Estimated Income Tax Paid _____

Contributions

Church or Religious Organization _____

Charitable Organizations _____

Miles Driven for Charity, _____

List Items Donated in good condition (Used Value)

Gambling Losses up to Winnings _____