

1040 CHECKLIST

INCOME

_____	W-2's	_____
_____	1099's	_____
_____	- interest	_____
_____	- dividends	_____
_____	- capital gains	_____
_____	Alimony received	_____
_____	Business income and expenses	_____
_____	IRA distributions	_____
_____	Pension and annuity distributions	_____
_____	Rental income and expenses	_____
_____	K-1's from partnership and S- Corp.	_____
_____	Unemployment compensation	_____
_____	Social Security benefits	_____
_____	Other Income	_____
_____	- gambling	_____
_____	- lottery	_____
_____	- prizes and awards	_____
_____	Stock Sales	_____
_____	- cost information	_____
_____	- dates purchased and sold	_____
_____	Home Sale/Purchase information	_____
_____	- closing statement	_____

DEDUCTIONS

_____	Medical expenses (if significant)
_____	Taxes paid
_____	- Real estate
_____	- State Income taxes
_____	- Property taxes (Car, etc)
_____	Home mortgage interest
_____	- Form 1098
_____	Points paid
_____	Investment interest
_____	Contributions
_____	- Cash
_____	- Property
_____	- Clothing
_____	Childcare expenses
_____	- ID No. of provider
_____	Alimony paid
_____	IRA, Roth, SEP & Keogh contrib.
_____	Tuition expenses (qualified)
_____	- Including books
_____	Student loan interest

MISCELLANEOUS

_____ Estimated Tax Payments (April, June, September and January)

- _____ - Federal - include dates paid, amount and check numbers
- _____ - State

_____ Copies of last year tax returns if not prepared by us.

_____ Property tax bill for CT property tax credit

_____ Dependents social security numbers - **required** to receive deduction

_____ Recently changed names (ie. marriage/divorce) must be updated with Social Security Admin.

_____ Sales tax paid on motor vehicles and boats, if not claiming the income tax deduction

_____ Contributions to CHET 529 Plan (College Savings)

Education Credits –

- _____ - Form 1098-T from each school if issued and complete address of each school
- _____ - Amount billed and amount paid from each institution and any scholarships received

Qualifying energy credit purchases (currently not available, except solar)

- _____ - Windows and doors, Roof and insulation
- _____ - Wood and pellet stoves, HVAC and water heaters
- _____ - Geothermal heat pumps, solar panels, and fuel cells

Health Insurance Coverage Information

_____ Form 1095-A Health Insurance Marketplace Statement

- _____ - Required if health insurance was purchased on the exchange.

- _____ - Form 1095-B or 1095-C if received

_____ If not purchased on the exchange, will need coverage dates if not a full year.

Please see our website for additional information and checklists

Visit us at www.stevenhintzcpa.com