

2019

TAX DATA

WORKSHEET

BRING ALL OFFICIAL RELATED DOCUMENTS

NEW CLIENTS: BRING COPY OF YOUR 2018 TAX RETURN & SOCIAL SECURITY CARD FOR FILERS & DEPENDENTS

- 1095 – A, B, or C (Health Insurance)
- W-2 Statements, W-2G (Gambling)
- 1099-INT (Interest)
- 1099-DIV (Dividends)
- Home Purchase/Sale Papers
- Home Mortgage Refinance Papers
- 1099 Social Security Income
- 1099-R (Pensions/Annuities Disb)
- 1099-R (IRA/Keogh Withdrawals/Rollovers)
- All IRA Year-end Statements
- 1099 Unemployment Income
- 1099 State Tax Refund
- Stock Sales-Buy Side & Sell Side
- 1099-B (Broker Statement)
- 1099 Miscellaneous Commissions
- 1099 Prizes, Gambling Income
- Rents
- Agricultural Payments
- K-1's S-Corps, Partnerships
- K-1's Estates, Trusts
- Alimony
- Jury Duty

▶▶ BRING VOIDED CHECK FOR REFUND DIRECT DEPOSIT—IF DIFFERENT FROM LAST YEAR ◀◀

FURNISH INCOME & EXPENSE DETAIL SEPARATELY OR CALL FOR A SPECIAL WORKSHEET

- Business Self-Employed
- Farm Rentals

NAME				
		Taxpayer		Spouse
Home Phone				
Cell Phone				
E-Mail				
First Name & Initial (Taxpayer)			First Name & Initial (Spouse)	
Occupation			Occupation	
Social Security # Birthdate			Social Security # Birthdate	
Mailing Address		New? Yes No	County	School District
City			State	Zip Code

Dependents				
Name:	Birthdate	X If not living with you	Months lived in your home	
First, Initial and Last (If Different)	(Req'd for Child Tax Credit)	Social Security #	Relation	

ESTIMATED TAXES PAID					
	Date Due	Date Paid	Federal	Date Paid	State
Fourth Qtr Prior	Jan 2019		\$		\$
First Quarter	Apr 2019		\$		\$
Second Quarter	June 2019		\$		\$
Third Quarter	Sept 2019		\$		\$
Fourth Quarter	Jan 2020		\$		\$

OTHER DEDUCTIONS & CREDITS
BRING TUITION PAID STATEMENTS/FORM 1098 T; MUST HAVE DETAIL OF EDUCATION EXPENSES PAID FROM COLLEGE/UNIVERSITY.
COLLEGE SAVINGS PLAN MN: BRING STATEMENT VERIFYING PAYMENTS
IRA (REGULAR & ROTH) BRING DETAIL OF ROLLOVERS, DISTRIBUTIONS & CONTRIBUTIONS.

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ITEMIZED DEDUCTIONS:

Questions:

MEDICAL EXPENSES - Generally Must Exceed 10% of Income for Federal & Most States	
Prescription Drugs (no "over-the-counter" drugs)	
Doctors/Dentists/Hospitals/Glasses/Hearing Aid & Battery	
Medical Ins. Premiums (out of pocket)	
Long-Term Health Care Premiums – Taxpayer/Spouse	
Medicare D Prem Deducted from Soc Sec or Paid Direct Medicare Premiums from Social Security	
Auto Travel (for medical purposes)	mi.
Out of Town Lodging & Number of Nights Insurance Reimbursements (only for above amounts)	
HSA-Bring 1099SA Form & 5498 Form -Summary Report/Contributions Made & Distributions	

TAXES PAID	
Real Estate - Residence	
Real Estate - 2nd Home	
Real Estate - Other (list)	
Auto License Fee –	
Sales Tax – Vehicle or Home Building Materials	

HOME MORTGAGE INTEREST PAID		
BRING YOUR 1098 FORM(S)	Primary Home	Second Home
Interest Paid to an Institution:		
Points		
Interest Paid to an Individual:		
Individual's Name:	Social Sec. #	
Address:		
Mortgage Ins. Premiums		

STUDENT LOAN INTEREST PD
Bring statement from lending agency.

CHILD OR DEPENDENT CARE		
Child or dependent care expenses to enable you to work or attend school full time. Number of children under 13:		
Name of Provider/Address	Soc Sec # or EIN #	Amount Paid

CHARITABLE CONTRIBUTIONS	
Cash/Check (only if substantiated by bank record or donee written receipt. MUST state that no goods or services were received by you)	
Payroll Deduction	
Travel For Charitable Purposes	mi.
Value of goods contributed (usually the fair market value). Name & address of charitable recipient and detailed list of donated items when total equals \$500 or more.	

MISC. PERSONAL BUSINESS & INVESTMENT EXPENSES NOT LISTED ELSEWHERE (MINNESOTA)		
	Taxpayer	Spouse
Dues: Union & Professional		
Employment Related Education/Seminars		
Tuition/Fees		
Books/Publications		
Licenses, Fee, Credentials, Etc.		
Tools, Supplies, Equipment		
Insurance-Business (E&O, Malpractice, Etc)		
Uniforms - Purchased		
Uniforms – Cleaned		
Business Travel (Explain)	mi.	mi.
-Meals		
-Lodging		
-Other Transportation		
-Reimbursement		
Job Seeking Expenses in Same Field		
-Employment & Resume Fees		
Investment Management Fees		
Safe Deposit Box		
Tax Preparation and Consulting Fees		
IRA or Keogh (HR-10) Fees Paid Directly		
Gambling Losses – Only to Amt of Winnings		
Tuition (K-12 Only)		
Text Books (K-12 Only)		
Other:		

SIGNATURE: _____