



# T-Accounting & Tax Service LLC

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101 Devant Street | Fayetteville GA 30214

## 1040 Checklist

Tax Year: \_\_\_\_\_

Taxpayer Name: \_\_\_\_\_

Spouse Name: \_\_\_\_\_

SSN: \_\_\_\_\_ DOB: \_\_\_\_\_

SSN: \_\_\_\_\_ DOB: \_\_\_\_\_

Occupation: \_\_\_\_\_

Occupation: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_

State: \_\_\_\_\_ Zip: \_\_\_\_\_

What was your marital status as of the last day of December?:  Married  Single

### Common forms (Mark if applicable)

- All W-2 Forms
- 1098 Mortgage Interest
- 1098-T Tuition, (MUST HAVE TO CLAIM DEDUCTION)
- 1099-MISC
- 1099-R Retirement accounts
- 1099-Int, 1099-Div Interest or dividends
- 1099-B Stock sales
- SSA-1099 Social Security
- 1095-A, B or C Health insurance information
- 1098-E Student loan interest
- 1099-SA Health Savings Account
- 1099-C Cancellation of Debt
- 1099-G Unemployment, state refunds
- K-1 Forms From a business or trust
- W-2G Gambling winnings

### Other Information (Mark if applicable)

- Casualty or theft losses Bad debts
- Tip Income not reported elsewhere
- Worthless investments
- Bank accounts held outside the USA
- Teacher expenses \$
- Anything else you might think we need
- Jury Duty Pay
- Did your kids make over \$1,050 in investment income?
- Info on sale or refinance of home. (Bring settlement statement, HUD-1)
- Did you install energy efficient property (For solar panels, geothermal, wind, fuel cells, must provide proof of purchase from contractor)

**Dependents:** Children or other relatives. \*Only list any new dependents and all that are over age 19.

	Dependent 1	Dependent 2	Dependent 3	Dependent 4
Name				
SSN				
DOB				
Relationship				
Months lived in home				
Full-time college student?				
Estimated Income				
Adopted in _____? Y/N				

**Direct Deposit Info:** Account Number: \_\_\_\_\_

Routing Number: \_\_\_\_\_

### Federal Estimated Tax Payment Made:

#1 April 15 \$ \_\_\_\_\_ #2 June 15 \$ \_\_\_\_\_ #3 Sept 15 \$ \_\_\_\_\_ #4 Jan 15 \$ \_\_\_\_\_



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### The following can be used as possible tax deductions.

For all of the following, IRS requires you to have receipts or other records as proof of expenses. Please retain for your records.

#### Gambling Winnings (Bring W-2G)

Gambling Losses \$ \_\_\_\_\_

#### Did you make contributions to an IRA?

Taxpayer Trad.\$ \_\_\_\_\_ Roth \$ \_\_\_\_\_

Spouse Trad.\$ \_\_\_\_\_ Roth \$ \_\_\_\_\_

#### Did you pay into a Health Savings account?

Contributions \$ \_\_\_\_\_

#### Did you pay or receive alimony? \*Not child support

Amt paid \$ \_\_\_\_\_

Amt Received \$ \_\_\_\_\_

#### Did you pay medical expenses?

Medical expenses \$ \_\_\_\_\_

Health insurance premiums (not paid through your employer) \$ \_\_\_\_\_

# of miles you drove for medical purposes \_\_\_\_\_

H.S.A Distributions – Bring in 1099-SA

#### Did you pay any of the following taxes?

Property tax paid on your home \$ \_\_\_\_\_

Property tax paid on any other properties:

Location \_\_\_\_\_ \$ \_\_\_\_\_

Sales tax on large new purchases such as car or boat.

\*Do not include registration fees.

Item \_\_\_\_\_ Sales tax paid \$ \_\_\_\_\_

#### Did you pay any mortgage interest? (1098)

Bring in form 1098 from each lender

#### Did you give money to charity?

Charity \_\_\_\_\_ Amount \$ \_\_\_\_\_

Charity \_\_\_\_\_ Amount \$ \_\_\_\_\_

Charity \_\_\_\_\_ Amount \$ \_\_\_\_\_

#### Did you donate items to charity (DI, Salvation Army, etc.)?

##### List estimated thrift store values:

Charity \_\_\_\_\_ Amount \$ \_\_\_\_\_

Charity \_\_\_\_\_ Amount \$ \_\_\_\_\_

Charity \_\_\_\_\_ Amount \$ \_\_\_\_\_

#### Did you volunteer with a charity?

Miles driven in personal vehicle \_\_\_\_\_

Unreimbursed Expenses \$ \_\_\_\_\_

#### Did you have unreimbursed work-related expenses?

Professional/Union Dues \$ \_\_\_\_\_

Professional publications/books \$ \_\_\_\_\_

Uniforms \$ \_\_\_\_\_

Tools/supplies/safety equipment \$ \_\_\_\_\_

Airfare \$ \_\_\_\_\_

Mileage\*Not commuting \_\_\_\_\_

Food & Entertainment \$ \_\_\_\_\_

Other (Parking, tolls, etc.) \$ \_\_\_\_\_

#### Did you have a home office exclusively used for business?

Total square ft. of home \_\_\_\_\_

Square ft. of office \_\_\_\_\_

Utilities \$ \_\_\_\_\_

Rent \$ \_\_\_\_\_

Home repairs/maint \$ \_\_\_\_\_

Home Insurance \$ \_\_\_\_\_

Security System \$ \_\_\_\_\_

HOA fees \$ \_\_\_\_\_

#### Did you pay childcare expenses?

Provider name \_\_\_\_\_

Provider SS# \_\_\_\_\_

Child name \_\_\_\_\_ Total \$ \_\_\_\_\_

Child name \_\_\_\_\_ Total \$ \_\_\_\_\_

#### Do you have college expenses? (1098-T required!)

Total paid for books \$ \_\_\_\_\_

Total paid for supplies \$ \_\_\_\_\_

#### Did you incur job hunt expenses looking for a new job in your same occupation?

Travel \$ \_\_\_\_\_

Meals \$ \_\_\_\_\_

Postage/Printing \$ \_\_\_\_\_

Other \$ \_\_\_\_\_

#### Moved due to change in employment?

Miles from your old home to your new workplace

Miles from your old home to your old workplace

Hotel stay \$ \_\_\_\_\_

Gas \$ \_\_\_\_\_

Mileage \_\_\_\_\_

Cost to move your belongings \$ \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_