



## Essentials to Have Ready for Your 2019 Tax Return Preparation

As you gather your papers and other tax information, here is a list of important items to have ready that allows Associated Tax to prepare your 2019 tax return most accurately and to your best advantage.

### Identification and Bank Information:

- Current picture ID – required by all states this year
- Proof of social security number for all new clients
- Social Security cards for any new dependents
- Routing and account numbers for direct deposit. You can use a check but not a deposit slip.

### Income Statements:

- W-2's from each place you were employed in 2019
- W-2 G's from any gambling winnings
- All 1099's including, but not limited to:
  - (1099 INT/1099 DIV) Interest/Dividends earned from banks and other investments
  - (1099 Misc) Self Employment Income
  - (1099 Misc) Rental Income
  - (1099-R) Pension, Annuity, Retirement plan distributions
  - (1099-G) Unemployment/State Tax Refund
  - (1099-B) Broker Statements (ex: sale of stocks, stock options, etc.)
  - (1099-C) Cancellation of Debt (forgiveness of debt)
  - (SSA-1099) Social Security Benefits
  - (1099-SA) HSA Distribution

### Contract Labor and Self-Employment Information:

- Add all income earned from self-employment or contract labor
- Separate and total all expenses incurred as a result of your self-employment income such as supplies, tools, materials, business vs personal miles driven, car expenses, etc.
- Checklist for day care providers is located on our website. Look for "Daycare Provider Checklist" under *Articles*.

### Itemized Deductions:

*Bring any of these in. You still may be able to itemize*

- Medical, dental or eye care expenses including after-tax insurance premiums
- Real Estate Taxes
- Personal Property Taxes (boats, cars, trailers, etc) (Motor Vehicle Tax on pink slip)
- Sales Tax paid on vehicles, motorcycles, RV's, planes and boats
- Home Mortgage Interest (Form 1098) from each mortgage if more than one
- Cash charitable contributions (Church, Salvation Army, United Way, etc)
- Non-cash charitable contributions (clothing, furniture, etc)

### Education Expenses:

- (1098-T) Tuition, deductible expenses for education
- (1098-E) Student Loan interest

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#### **Child Care Expenses:**

- Provider name, address, EIN or social security number
- Amount paid for each child

#### **Affordable Care Act:**

- (1095-A) if insurance purchased through the marketplace (You must wait for this form)

#### **New W-4 Form Goes Into Effect 2020:**

The IRS has published its new W-4 form which determines the amount of income tax withheld from your payroll. Now, early in the year, is the time to review how much income tax is taken out of your paycheck so you can avoid any tax return surprises next year.

- Recent paycheck stub or payroll document to review and determine withholding in 2020

If there are any questions as to whether you should bring something or not, the best advice is to bring it with you.

Associated Tax has been in business of preparing tax return for over 45 years. We look forward to helping you!

#### **Contact either of our two Associated Tax Omaha locations**

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Also get more information on our website [\*\*associatedtaxomaha.com\*\*](http://associatedtaxomaha.com)