

Your 2019 tax return checklist.

Highlighted below is a list of items we need to complete your 2019 tax return. Please bring these items with you to your appointment or mail them with your completed tax questionnaire.

INCOME

- ☐ Workin' for a livin'? If so, we need all your **W-2s**.
- ☐ Found yourself or your spouse unemployed? We'd like your **1099Gs**.
- ☐ Making some interest on your money? It's your **1099-INT** we need.
- ☐ Invested in the market? We'll need your **1099-DIVs and 1099Bs**.
- ☐ Enjoying social security benefits? Congrats, we need your form(s) **SSA-1099**.
- ☐ Receiving retirement income? It'll be **1099-R** forms that we will want to see.
- ☐ Are you a partner in a partnership or a shareholder in an S-Corporation? We are going to need your **K-1 form(s)**.
- ☐ And the same if you are receiving any income from a trust or estate.
- ☐ Got lucky at the casino or other gambling? If so, we could use your form **W-2G(s)** and your **expenses/losses**.
- ☐ If you received a state or local tax refund in 2019, please also bring in forms **1099-G** that you receive.
- ☐ Rent your property in 2019? Here's what we would like:
 - ☐ Your **income, including 1099-MISC**.
 - ☐ Your **expenses, including mileage**.
- ☐ Self-employed? Good for you! Please bring in all your **records of income, expenses, assets, and liabilities**.
- ☐ Farming? That's great! We'd like the **same records as for self-employed**.
- ☐ Sell your home? Please bring in form **1099-S, closing statement, and your cost of the home you sold**.
- ☐ Any other income? Please bring in **1099-MISC form and records of any related expenses**.

Checklist continued on the back ...

EXPENSES

- ☐ Contribute to an **IRA, SEP, SIMPLE, or plan to do so by 4/15/20**? We will want **amounts contributed for you and/or spouse**.
- ☐ How about an HSA? We will need the **same information as above**.
- ☐ Are you an educator? We will want your **unreimbursed expenses**.
- ☐ In the reserves? We salute you and request your **expenses**.
- ☐ Move while on active duty? We'd like to know **distance and your direct costs**.
- ☐ Paying on student loans? **1098-Es** we could use.
- ☐ Speaking of education ... If you or your child is attending college, we will need your form **1098-T, as well as the cost of items like books, supplies, and equipment**.
- ☐ Paying alimony? Sorry, but at least it may be deductible. We will want **amount paid**.
 - ☐ If your divorce occurred in 2019, please provide us with a **copy of your divorce agreement**.
- ☐ Itemize your deductions? If so, here's what we need:
 - ☐ **List of your medical deductions.**
 - ☐ **Property, sales tax, and license tab fees.**
 - ☐ **Mortgage / home-equity loan interest paid to buy, build or improve your home.**
 - ☐ **List of charitable contributions paid.**
 - ☐ **Gambling losses incurred with gambling winnings.**
- ☐ Paying for childcare while working? We'll want **name, ID number, address, and amount paid to the provider**.
- ☐ Make energy-efficient home improvements in 2019? Please provide **details and costs**.
- ☐ Receive an ACA premium tax credit? We are going to need your **1095 form(s)**.
- ☐ Were you a victim of identity theft within the last year? We will need a **copy of your drivers license**. If you have received a **letter from the IRS with an assigned IP PIN number** for the 2019 tax year, please provide that, as well.

We tried to cover every situation, but please provide any other information you think we may need!

H&S knows how personal and important questions about your financial future are. Trustworthy information and answers are not always easy to find, which is why we work closely with the Certified Financial Planner practitioners and Financial Advisors in our Wealth Management division. Through them we are pleased to offer a **Foundational Advice review**.

Foundational Advice is a conversation about your goals and whether you are on track to achieve them. There is no cost for this baseline analysis. **Please complete and return the included worksheet if you would like a review.**

You may also check any of the items below that you're interested in receiving more information about, and we'll make sure to get you connected with a professional that fits your needs. We offer a one-hour consultation at no cost.

- ☐ **Integrating Investments** - with tax planning to maximize returns
- ☐ **Retirement Planning** - analysis of savings needed to retire, social security analysis, investment and income management
- ☐ **Financial Planning** - including education planning, insurance, cash flow, and budget