



12365 Huron St Suite 1800  
Westminster, Co 80234  
e-mail stephanie@paulinestaxservices.com  
Phone (303)301-7167  
**Tax Planning 2018**

<https://ptsdocs.securefilepro.com/connect/#/login>

Hold and upload all documents and information at the same time

\_\_\_ Copy of Last Year's Tax Return: Have you moved or changed your phone number?

- Proof of identification (photo ID) for taxpayer and spouse
- Social Security cards for the taxpayer, spouse and dependents
- An Individual Taxpayer Identification Number (ITIN) assignment letter may be substituted for those who do not have a Social Security number
- Proof of foreign status, if applying for an ITIN
- Birth dates for the taxpayer, spouse and dependents

## **General Taxable Income**

\_\_\_ *W-2 Form(s)* for Wages, Salaries, and Tips

- Wage and earning statements (Form W-2, W-2G, 1099-R, 1099-Misc) from all employers and other payers

\_\_\_ Interest Income Statements: *Form 1099-INT & 1099-OID*

\_\_\_ Dividend Income Statements: *Form 1099-DIV*

\_\_\_ Sales of Stock, Land, etc.: *Form 1099-B*

\_\_\_ Sales of Real Estate: *Form 1099-S*

## Tax Planning 2018

\_\_\_ State Tax Refunds: *Form 1099-G*

\_\_\_ Alimony Received or Paid

\_\_\_ Unemployment Compensation Received: *Form 1099-G*

\_\_\_ Miscellaneous Income: *Form 1099-MISC* (usually given to independent & sub - contractors)

\_\_\_ Don't forget expenses: Mileage, Telephone/Internet, Office Expenses, etc....

### **Retirement Income and Other Withdrawals**

\_\_\_ Retirement Income, IRA, 401K: *Form 1099-R*

\_\_\_ Social Security and Railroad Retirement Income: *1099-SSA*

### **Business Income**

\_\_\_ Business Income and Expenses: *1099MISC*; or Profit/Loss Statement, Spreadsheets...

\_\_\_ Rental Income and Expenses. *Profit and Loss statement*

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Form K-1 Income from Partnerships, Trusts, and S-Corporations

Miles Traveled for Business Purposes

### **Tax Credits Checklist**

Child Care Provider Address, I.D. Number and Amounts Paid

Adoption Expense Information

Foreign Taxes paid

~~First Time Home Buyer Tax Credit~~

### **Expense and Tax Deduction Checklist**

- Health Insurance Exemption Certificate, if received or Forms 1095-A, B and C, Health Coverage Statements

Medical Expenses for the Family

Medical Insurance Paid

Prescription Medicines and Drugs

Doctor and Dentist Payments

Hospital and Nurse Payments

Miles Traveled for Medical Purposes

Home Mortgage Interest from Form 1098

Home Second Mortgage Interest Paid

Real Estate Taxes Paid

State Taxes Paid with Last Year's Return (if itemized)

## Tax Planning 2018

\_\_\_ Personal Property Taxes Paid: Own Tax on Registration

\_\_\_ Cash Contributions to Charities: CASH/CHECK; calculated dollar amount.

\_\_\_ Fair Market Value of Non-cash Contributions to Charities: GOODWILL.

\_\_\_ Unreimbursed Expenses Related to Volunteer Work