ASCEND
CPAs and Advisors, LLC

Ron Harris, CPA

Individual Tax Checklist

Tax Year: 2019

GENERAL INFORMATION

	Legal Name	SSN	D/O/B	Occupation
Taxpayer				
Spouse				

Address ______________________________

Telephone ______________ **Email address** ______________

Bank Information for Direct Deposit/ACH Bank Routing Number ______________ Account Number ______________

Dependents	Legal Name	SSN	D/O/B	Relationship
Dependent				
Dependent				
Dependent				
Dependent				

Child Care Provider's Name ______________________________

Child Care Address ______________________________

Child Care Tax ID Number ______________ Amount paid $ ______________

How would you like to receive your copy of the Tax Return (check one or both)

☐ Printed ☐ Electronic

PERSONAL INFORMATION

☐ Yes ☐ No Did your marital status change during the year?

☐ Yes ☐ No Did your address change during the year?

☐ Yes ☐ No Were there any increases or decreases to the number of dependents?

☐ Yes ☐ No Did you have any children under age 19 or full-time students under age 24 at the end of the tax year who had interest/dividend income of $950 or other investment income?

☐ Yes ☐ No Did you have health insurance this year? If so, how many months were you covered?__________

☐ Yes ☐ No During the year, did you go without health insurance for any period greater than two months? If yes, please provide reasons on separate sheet. ***(If you have received Form 1095, please attach.)***

INCOME ITEMS (Please attach relevant documents)

☐ Yes ☐ No W-2s provided by your employer(s)

☐ Yes ☐ No Social Security Benefits (Form SSA-1099)

☐ Yes ☐ No Interest and Dividend Income (Form 1099-Int and Form 1099-Div)

☐ Yes ☐ No Did you have an interest in or authority over a financial bank or investment account in a foreign country?

☐ Yes ☐ No Business Income reported on Form 1099-Misc

☐ Yes ☐ No Sale of Stocks, Bonds, or Crypto Currency, Other Investments (Please provide 1099-B or Alternate Sales Records)

☐ Yes ☐ No Did you make an Opportunity Zone Investment to defer capital gains?

☐ Yes ☐ No Real Estate Sales (Attach Settlement Statement) **(see Real Estate Tax Checklist)**

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Individual Tax Checklist - Continued

- ☐ Yes ☐ No IRA/Pension distributions / Rollovers / Transfers received (Form 1099-R)
- ☐ Yes ☐ No State and local tax refunds (Form 1099-G)
- ☐ Yes ☐ No Unemployment Income (Form 1099-G)
- ☐ Yes ☐ No Did you receive mortgage interest from an outstanding loan?
- ☐ Yes ☐ No Gambling winnings (Form W2-G/Form 1099); Prize money or in-kind?
- ☐ Yes ☐ No Paid Tuition Expenses (Form 1098-T)
- ☐ Yes ☐ No Student Loan Interest (Form 1098-E)
- ☐ Yes ☐ No Cancelled or Forgiven Debts (Form 1099-C) **or** Abandoned Property (Form 1099-A)
- ☐ Yes ☐ No Distribution from an Education Savings Account or Qualified Tuition Program (Form 1099-Q)

ESTIMATED INCOME TAX PAYMENTS

☐ Yes ☐ No Did you make any estimated payments for 2019? If yes, please list the amount and date paid below.

Amount	$ ______	Date Paid	______
Amount	$ ______	Date Paid	______
Amount	$ ______	Date Paid	______
Amount	$ ______	Date Paid	______

ITEMIZED DEDUCTIONS (Please respond and attach documents.)

- ☐ Yes ☐ No Medical expenses? (e.g. doctor visits, pharmacy, insurance, hospitalization, supplies) $ ______
- ☐ Yes ☐ No Medical miles? How many miles did you drive to tend to medical/dental needs? ______
- ☐ Yes ☐ No Did you purchase a vehicle? If so, how much sales tax was paid? $ ______
- ☐ Yes ☐ No Real estate taxes paid on primary residence/second home? Please list. $ ______
- ☐ Yes ☐ No Did you register vehicles? Please list the amount you paid for each. $ ______
- ☐ Yes ☐ No Mortgage interest and mortgage insurance paid (Form 1098) $ ______
- ☐ Yes ☐ No Did you pay investment interest? If so, please list. $ ______
- ☐ Yes ☐ No Did you refinance? If so, please provide a copy of your settlement statement. $ ______
- ☐ Yes ☐ No Did you make any charitable **Cash/Check** donations? Please attach list and amounts. $ ______
- ☐ Yes ☐ No Did you donate any in-kind (non-monetary) items to charity that totaled over $500? $ ______

Name and address of Charity: ______

Description of items ***Attach separate sheet if necessary***

- ☐ Yes ☐ No Charitable Miles? Please list the number of miles driven for charitable purposes. ______
- ☐ Yes ☐ No Were you a victim of a qualified disaster resulting in a casualty loss?
  Please describe your damages and the value of the items not paid for by insurance. $ ______
- ☐ Yes ☐ No Income tax preparation fees? If yes, please list the amount paid. $ ______

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Individual Tax Checklist - Continued

☐ Yes	☐ No	Did you withdrawal from an IRA/pension before age 59 1/2? If so, please list the reason(s).	$
☐ Yes	☐ No	Safe deposit box fees to store income-producing stocks/bonds? Amount paid?	$
☐ Yes	☐ No	Did you pay Estate Tax? Please provide the amount paid.	$
☐ Yes	☐ No	Gambling losses? (Note: you may deduct gambling losses to the extent of winnings.)	$

OTHER ITEMS

☐ Yes ☐ No Did you start a business or acquire interest in a partnership or S Corporation?
If yes, please complete the Business Tax Checklist

☐ Yes ☐ No Would you like to know if you qualify to receive the Qualifying Business Income Deduction under IRC Section 199a? **If yes, please schedule a time to discuss.**

☐ Yes ☐ No Did you purchase rental or royalty property? **(Please complete the Real Estate Tax Checklist.)**

☐ Yes ☐ No Did you purchase or sell your principal home, take a home equity loan, or acquire a second home?
If yes to either question, please attach your settlement statement or any other pertinent documents.

☐ Yes ☐ No Did you purchase an electric vehicle? If so, please attach the purchase documents.

☐ Yes ☐ No Did you install solar panels on your home and/or make other energy efficient improvements?

☐ Yes ☐ No Did you, your spouse, or dependents incur any tuition expenses that are required to attend a college, university, or vocational school? Please list item and expense amount below:

Computer /Laptop	$
Books	$
Supplies	$
Tuition	$
Other (Specify)	$
	$

RETIREMENT PLANNING

☐ Yes ☐ No Would you like information on how to grow your hard-earned money so that it is available, tax-free when you need it most?

☐ Yes ☐ No Do you have a tax effective exit plan for your IRAs?

☐ Yes ☐ No Are your beneficiary designations correct? When is the last time they were updated?

☐ Yes ☐ No If you have ever been divorced, did you update your retirement plan beneficiary designations?