

# What I Need to File



**Reminder:** 2018 taxes are due April 15, 2019 for calendar year filers

You Spouse Dependents

## Basic Info

Name, SSN or ITIN, and date of birth

Last Year's Return - hard copy or PDF file (TaxAct can import basic info from PDF's of returns prepared by select software solutions)

Estimated Taxes Paid

You Spouse Dependents

## Documents Received

Form W-2s - wage and tax statements

Form 1095s - includes health insurance marketplace statement (1095-A), health coverage (1095-B) and employer-provided health insurance offer and coverage (1095-C)

Form 1098s - includes mortgage interest (1098) and student loan interest (1098-E)

Form 1099s - includes dividend income (1099-DIV), interest income (1099-INT & 1099-OID), merchant card and third party network payments (1099-K), miscellaneous income (1099-MISC), retirement plan distribution (1099-R), sale of home or real estate (1099-S), capital gain transactions (1099-B), distributions from an HSA, Archer MSA, or Medicare Advantage MSA (1099-SA) and unemployment compensation (1099-G)

Form 2439s - notice to shareholder of undistributed long-term capital gains

Schedule K-1s - partnership, S Corporation and estate or trust income

You Spouse Dependents

## Personal Records

Child and Dependent Care Expenses

Education Expenses

Medical Expenses

Vehicle (Personal Property) Taxes Paid

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## Personal Records

    

Real Estate Taxes

    

Mortgage Interest Paid

    

Charitable Contributions

    

Business or Employee Expenses

    

Gambling Expenses

    

Investment Transactions

    

Retirement Contributions

    

Foreign Earned Income and Foreign Taxes Paid

    

Moving Expenses

You   Spouse   Dependents

## E-file/Print

    

Bank Information (Account and Routing Number for Direct Deposit/Withdrawal)

    

Prior year's Self-Select PIN or Prior year's AGI (Adjusted Gross Income)



**Notes**

SPENCER  
 ACCOUNTING  
 GROUP